

Mentoring

Be a Mentor...Be the Difference



**Ob-Gyn Faculty Mentoring Handbook:
A guide to best practices in mentoring**

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**Department of
Obstetrics and Gynecology**
UNIVERSITY OF WISCONSIN
SCHOOL OF MEDICINE AND PUBLIC HEALTH

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**Department of
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UNIVERSITY OF WISCONSIN
SCHOOL OF MEDICINE AND PUBLIC HEALTH

Greetings,

Welcome to the Department of Obstetrics and Gynecology in the University of Wisconsin School of Medicine and Public Health.

Our mission at the University of Wisconsin, [Department of Obstetrics and Gynecology](#), is to improve the quality of life for women in the state of Wisconsin and beyond by providing compassionate high quality patient care and by advancing knowledge through research, education and advocacy. We do so in an environment of collaboration, humility, integrity and respect.

The vision of the Ob-Gyn Faculty Mentoring Program is to support the professional development, success and well-being of all faculty in the department.

We hope you will find this Faculty Mentoring Handbook to be a valuable resource!

Sincerely,



Laurel W. Rice, MD
Chair and Professor, Department of Obstetrics and Gynecology
The Ben Miller Peckham, MD, PhD, Endowed Professor



Ellen Hartenbach, MD
Professor and Vice Chair of Faculty Development
The Gloria E Sarto MD PhD Chair of Women's Health
and Health Equity Research

Message from the Ob-Gyn Mentoring & Promotions Team

The Ob-Gyn Faculty Mentoring Handbook for the 2019-20 academic year has been updated from the first edition produced in August 2018. Our goal is to update the handbook on an annual basis in collaboration with the Ob-Gyn Faculty Development Committee and the SMPH Council of Faculty Development Liaisons to keep current with any changes in policies or procedures and to add new resources as they become available or come to our attention.

We are also pleased to share that since the release of the handbook last year, the department now has a webpage dedicated to the [Faculty Mentoring Program](#) that serves as another central location to access resources, tools and alerts about training opportunities and career development workshops.

We hope you find these resources support your mentoring and professional development. Your input and suggestions are always welcome!

Sincerely,

Ob-Gyn Mentoring & Promotions Team

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Introduction

The goal of this handbook is to provide guidelines, procedures and best mentoring practices to support the professional development of faculty in the Ob-Gyn department. In recommending these best practices for mentoring committees, the Department of Obstetrics & Gynecology is committed to the success and well-being of the faculty.

Why Mentoring Matters

Faculty at all career stages benefit from strategies designed to maintain and increase their productivity and joy in their careers¹. One of the most important of those strategies is mentoring. Studies of mentoring in the health professions find real benefits for faculty at all career stages. Compared to those without mentors, faculty with mentors demonstrate higher levels of the following success factors:

- Teaching effectiveness evidenced by declines in teaching anxiety and improved student ratings of teaching effectiveness²;
- Research productivity^{3, 4};
- Professional socialization and interactions with colleagues⁵;
- Salary levels and satisfaction with salary and promotion⁶.

Effective mentoring is also key to the recruitment and retention of a diverse faculty. A longitudinal study revealed that underrepresented minority faculty in academic medicine attributed their success to access and support of senior faculty mentors, peer networking, professional skill development, and knowledge of institutional culture⁷. Promoting a culture that values mentoring reflects the Department of Obstetrics & Gynecology's commitment to [diversity, equity and inclusion](#).

Research on new faculty shows important findings⁸ in organizing effective faculty mentoring systems. Their findings suggest important elements of establishing formal mentoring systems, especially those that support effective mentoring across faculty of different backgrounds. Although informal mentoring is an important component of academic life, formal mentoring structures such as the mentoring committee for early-career faculty is key to supporting their academic, clinical and research goals and securing a successful path towards promotion. Therefore, this section of the Faculty Mentoring Handbook focuses on **best practices for mentoring committees**.

Role of the Mentoring Committee

The **overall goal** of the mentoring committee is to provide assistant professors with both guidance toward appropriate productivity and regular evaluation of progress toward promotion on the tenure and CHS track. The Ob-Gyn department has a formal mentoring program for CHS and tenure faculty since these are probationary tracks and promotion is a requirement for ongoing employment. Faculty on the CT track can choose to participate in the formal mentoring program as desired based on career goals. The specific guidelines for promotion on each track are shared with faculty at the time of appointment. The mentoring committee will provide faculty with an objective assessment of performance relative to the CHS, tenure, and CT track guidelines and counsel faculty on early career development. This will assist the faculty in obtaining their academic, clinical and research goals. Promotion is generally after five years and potential areas of focus include excellence in education, research, clinical practice, leadership or service. The Ob-Gyn [Mentoring Timelines by Promotional Track](#) is a resource to guide mentoring committees. These guidelines

and timelines are suggested best practices and may vary based on the needs of individual faculty. The UW School of Medicine and Public Health guidelines and requirements for promotion according to faculty track are available on the [SMPH Intranet](#).

The Ob-Gyn Department has established the following guidelines to optimize the scheduling, preparation, note taking and follow up to mentoring committee meetings.

Ob-Gyn Mentoring Committee Meeting Procedures

1

- **Mentoring committee meetings are scheduled** by the assistant professor (mentee) with assistance from the medical program assistant (MPA).
- **At least 2 weeks in advance** of the mentoring committee meeting, the **mentee uploads** CV, IDP and other relevant materials to their mentoring and promotions folder (on UW Box). The MPA confirms that the mentee's materials are in the mentee's folder in advance of the meeting.

2

- **The mentee and all mentoring committee members have access** to the contents in the mentee's mentoring and promotions folder. The folder will be updated after each mentoring committee meeting.
- **The MPA will send out an email reminder** 1 week in advance of the mentoring committee meeting with a link to the meeting materials filed in the mentee's folder.

3

- The **meeting note taker (MPA or other) distributes a draft of the mentoring committee summary report** after each meeting to the mentoring committee chair, mentee and promotions coordinator for their feedback and approval. Feedback is requested within one week, otherwise notes are considered approved.
- The **mentoring committee chair** is responsible for ensuring that within two weeks, the finalized mentoring committee meeting minutes are uploaded to the mentee's mentoring and promotions folder (on UW Box) and sent via email to the mentee, their division director, the department promotions coordinator, and the department chair

The **primary role of the mentoring committee is to provide valuable and effective guidance to assistant professors with regard to promotion.** The mentee will often have other mentoring relationships external to the committee that meet a specific need (e.g. research, education or clinical mentor). Overall, a **mentoring committee, as well as individual mentors, can provide the mentee with the following types of suggestions and advice:**

- Suggestions for *research collaborations* and introductions when appropriate.
- Suggestions for *journals* in which to publish studies.
- Speaking or *teaching* opportunities: which to seek and accept and which to avoid.
- Professional *service* opportunities.
- Participation in state, regional, or national *professional organizations*.
- Advice about *grantsmanship*.
- Protection from excessive demands for service on committees, task forces, etc.
- *Advocacy* on behalf of the mentee within the department when appropriate.
- Emotional support and honest, *constructive feedback* when appropriate.

Establishing and Maintaining an Effective Mentoring Committee

Selection Process

The first step to establishing an effective mentoring committee is the selection of the committee members and chair. The mentors will be faculty members with investment in promoting academic endeavors of the mentee. The overall goal for the mentor-mentee relationship is to engage in ongoing efforts to promote success in research, educational excellence and academic stewardship.

The department has established the following guidelines and requirements for the composition of the committee.

The **division director** forms an individual mentoring committee for assistant professors in their division shortly after their arrival to the department (within 3-6 months). The division director reviews the new faculty Individual Development Plan, seeks input from the assistant professor about potential committee members, and designates a chair for the mentoring committee. The division director typically does not serve on the mentoring committee because of the potential conflict of interest. However, assistant professors should meet at least annually with their division director to review the assessments and recommendations from the mentoring committee.

Mentoring committees

- The committee should consist of three members including the mentoring committee chair. *Suggested membership* includes one member of the same faculty division and at least one faculty member outside of the department with expertise and experience relevant to mentee's career goals.
- Each mentoring committee has a designated mentoring committee chair with at least a rank of associate professor.

- **The following criteria may be considered when selecting members:**
 - Interest in contributing to the mentoring process.
 - Availability (time and distance) for planned meetings.
 - Familiarity with relevant promotional guidelines and processes.
 - Skill set of mentor (e.g., expertise pertinent to the needs of the assistant professor).
 - Relevant research, clinical, and teaching interests.
 - Personal characteristics (e.g., personality, approach, life experiences).
 - Promotional track (CHS, tenure, CT track, or a mixture).
 - Assistant professors may serve as a member of mentoring committees if they are near promotion (years 4-5), but should not take on the role of chair until promoted.

The assistant professor completes an Individual Development Plan (IDP) within 3-6 months of joining the department. The IDP is uploaded to their individual folder within the Ob-Gyn Mentoring and Promotions folder on UW Box and shared with the division director to support selection of appropriate mentors.



Tools such as a [Mentoring Plan Worksheet](#) may be helpful for discerning the roles of multiple mentors.

Annual Review of Mentoring Committee

- The division director discusses whether the mentoring committee meets the faculty member's career development needs during their annual review meeting. This assessment will be completed as part of the Faculty Annual Performance Review process, giving faculty an opportunity to discuss whether their mentoring needs are being met at this point, and to make changes to the mentoring committee as needed. If there are mentee concerns, they may seek guidance from the Department Chair.
- The assistant professor may request changes in the composition of the mentoring committee in collaboration with and approval of the division director and/or department chair.
- Members of the committee will participate throughout the probationary period, but may be excused by the department chair and/or mentoring committee chair if they are unable to attend meetings consistently, are ineffective, or are unable to participate for other reasons.
- During the first 3 years of their appointment, assistant professors are asked annually to confirm that they are on the correct faculty track. If track transfer is being considered, work with division director and mentoring committee as early as possible to take action as needed (ideally within 2 years of appointment). The UW SMPH does not permit track transfers after 3rd year of faculty appointment.

Mentee and Mentor Roles and Responsibilities

Once the mentoring committee is established, the next step toward establishing an effective mentoring committee is **communicating and aligning expectations for all committee members** (mentors and mentee). A clear understanding of respective roles and expectations, especially faculty who may be new to serving on a mentoring committee, will promote effective communication. Equally important is that the assistant professor (mentee) understands their responsibilities and is prepared to communicate regularly with the committee and the division director. The mentee and mentor roles and responsibilities are outlined

below.



Tools such as [Mentoring Agreements](#) between mentors and mentees are often helpful to guide and clarify the process of **aligning expectations**.

Each faculty with a mentoring committee will have a folder within the “Ob-Gyn Mentoring” Folder (on Box), with editor privileges. See the [Mentoring Committee Meeting Procedures](#) for further details on scheduling and preparing for mentoring committee meetings.

Assistant Professor (Mentee)

- Work with division director to form mentoring committee. Prepare [Individual Development Plan](#) (IDP) to support selection of appropriate mentors.
- Prepare materials for review and discussion (CV and IDP with biannual updates) and alerting the committee to questions and concerns.
- Format CV to align with the UW [SMPH CV](#) template.
- Meet with mentoring committee bi-annually in the first 3 years and at least annually thereafter.
- Prepare preliminary promotion document at the appropriate time under the guidance of the mentoring committee chair and division director. The Department Promotions Coordinator provides administrative support.
- The mentee’s medical program assistant (MPA) assists with scheduling the biannual mentoring committee meetings.
- Assistant professors should keep track of their promotion timeline: date of appointment, date to begin assembling the promotional document, and the dates the document is due to official mentors or ad hoc mentors, the departmental executive committee, and the promotional committee. These documents should be stored in the faculty’s individual mentoring and promotions folder stored on UW Box.

Together with their mentoring committee, assistant professors should review the [Mentoring Timelines by Promotional Track](#) to guide the process.

Mentoring Committee Chair

- The **mentoring committee chair** initially meets 1:1 with the **assistant professor** in advance of the initial mentoring committee meeting to review their Individual Development Plan. At the subsequent mentoring committee meetings, the mentoring committee chair facilitates the discussion during which the committee members review faculty progress and provide career advice.
- The **mentoring committee chair** either prepares the mentoring committee minutes personally or reviews and edits the mentoring committee meeting minutes prepared by the designated medical program assistant. In either case, the mentoring committee chair is responsible for ensuring that within two weeks, the finalized mentoring committee meeting minutes are uploaded to the mentee’s mentoring and promotions folder on Box and sent via email to the mentee, their division director, the department promotions coordinator, and the department chair.
-

Mentors

- It is essential that mentors be familiar with and understand current UWSMPH [promotional](#)

[guidelines](#).

- Within reason, members should be available for meetings when given ample time in advance for scheduling. If a committee member cannot attend a meeting, the member should make an effort to meet with the assistant professor in person at a time close to the scheduled meeting.
- All members, even those not able to attend the meeting, should review the summary report of the meeting to ensure that the assistant professor is receiving consistent advice from various members of the mentoring committee.
- Committee members should review the time commitments of the assistant professor (teaching, research, clinical service, academic service, outreach, leadership, other) and help the faculty member identify activities most crucial for professional development and promotion. For example, this may involve advising the assistant professor to decline certain invitations or making recommendations to the division director to limit certain assignments (e.g., additional clinical, teaching or committee work).
- Mentors guide assistant professors through the promotion process with feedback on milestones to achieve in the early (1-2 years), mid (3-4 years), and late (5-6 years) phases of the probationary appointment.
- Mentors provide advice to mentees about time commitments related to clinical duties and intervene as needed to ensure clinic responsibilities are not compromising academic goals.
- Mentors may advise on teaching responsibilities and intervene with the department chair/course coordinator as needed. Ensure that the assistant professor is receiving constructive feedback on teaching from faculty peer reviews.
- Confidentiality of information shared during mentoring committee meetings should be maintained, unless otherwise indicated by the assistant professor.

Mentor Expectations

Mentors assess the mentoring relationship at least annually and review expectations with the mentee. Mentors are expected to support their mentee's timely progress toward promotion and other career goals.

Mentee Expectations

Assistant professors are responsible for keeping track of their [promotional timeline](#): date of appointment, date to begin assembling the promotional document, and the dates the document is due to official mentors or ad hoc mentors, the departmental executive committee, and the promotional committee. The assistant professor provides the members of the mentoring committee with documents pertinent to the meeting (see [Mentoring Committee Meeting Procedures](#)).



MENTOR Best Practices

- Provide constructive feedback, with realistic assessment of strengths and areas for improvement.
- Identify appropriate committees and stewardship activities.
- Assist in identifying research opportunities.
- Explore and facilitate faculty development opportunities both locally and nationally.
- Provide assistance and feedback with grant applications/lectures/presentations.
- Focus on mentee's priorities.
- Suggest potential research collaborators and provide advice or guidance on funding sources, grant-writing workshops, and examples of successful grants, if relevant.
- Offer to help with informal grant reviews in advance of submission to the funding source. Help strategize for success in grant writing and offer to help with grant revisions.
- Suggest that one or more members of the mentoring committee review drafts of manuscripts intended for submission to peer-reviewed journals prior to first submission and provide guidance on appropriate journals.
- Mentors are responsible for reviewing the materials and providing specific and detailed feedback on areas of strengths and areas that need improvement/more progress.



MENTEE Best Practices

- Anticipate meeting every 6 months in the first 3 years and then annually – if progress is satisfactory – until promotion. More or less frequent meetings may be needed based upon the individual's progress or timing of promotion.
- Use the first mentoring committee meeting as an opportunity for introductions, review everyone's roles and responsibilities and discuss a plan for effective communication. Subsequent meetings will be dedicated to career goals, plans and resources. Ensure that the relevant promotional guidelines are reviewed during year one.
- Keep records of achievement (annual performance reviews, teaching evaluations, letters of thank you, accolades received, etc.). These materials can be stored in the mentoring and promotions folder for reference when writing promotion statement.
- Collect and distribute materials for review well in advance of the meeting to provide adequate time for review by the mentors. Minimally, materials should include updated curriculum vitae in [UWSMPH](#) format, updated IDP and minutes from the last meeting (See [Mentoring Committee Meeting Procedures](#)).
- It is recommended that the assistant professor on **CHS track** define their area of excellence and significant accomplishment by the end of year 2 and prepare a draft of their personal statement to review with their mentoring committee.
- It is strongly recommended that the assistant professor on **tenure track** prepare a draft promotional document and provide it to the mentoring committee before the end of year 3. The assistant professor will continue to build this document in subsequent years leading to its final preparation during the late phase of the probationary period.

Best Practices for Initial Mentoring Committee Meetings

Whether new faculty are former UW trainees or clinical instructors or are new to UW–Madison, a series of meetings within the first year of their arrival will serve to introduce them to the expectations of their new position and facilitate the ability of the mentoring committee to help them achieve promotion and their career goals.

First Meetings: Introductions to Mentoring & Promotion Resources (within 2-3 months of arrival)

Introduction to Department Mentoring and Promotion resources by promotions coordinator

- New faculty member is provided with a copy of the Ob-Gyn Faculty Mentoring Handbook.
- Online resources for Faculty Development, located on the Department extranet, are introduced.
- Introduce Mentoring and Promotion folder on UW Box, Individual Development Plan (IDP), UWSMPH CV template and track specific promotional guidelines; request new faculty member complete IDP and CV within 3 months, for review by division director when selecting appropriate mentors.

Introduction to Faculty Mentoring Program by associate director of mentoring and vice chair of faculty development

- Share mentoring resources and advice about selecting mentors and mentoring committee processes.
- Review best practices for mentees.

Second Meeting: Establishing Goals and Expectations (within 3-6 months of arrival)

- The mentee, with assistance from their MPA, will organize the first meeting (date, time, location).
- The assistant professor will meet 1:1 with the **mentoring committee chair** for feedback on their Individual Development Plan in advance of the initial mentoring committee meeting.
- The assistant professor will update their curriculum vitae and [IDP](#) and send to their MPA who will share with committee members in advance of the meeting (See [Mentoring Committee Meeting Procedures](#)).
- The assistant professor provides information about their background and clinical/teaching/research interests, so that the mentoring committee can begin to offer advice about potential resources.

Third Meeting (within 6-12 months of arrival): Review Promotional Guidelines

- The assistant professor will bring the letter of appointment with percent distribution of effort and date of appointment to the meeting.
- **Mentoring committee** members will review the general timeline for promotion with the assistant professor and discuss the relevant UWSMPH promotional guidelines.
- Responsibilities and expectations will be reviewed and resources, including potential collaborators will be identified.
- The Ob-Gyn Faculty Mentoring Handbook, the UW SMPH [promotional guidelines](#), and the faculty annual review summary form and processes will be reviewed with the assistant professor. Terms, such as *academic clinical practice*, areas of *excellence* and *significant achievement*, and *arms-length evaluators*, will be defined.
- Extensions of the probationary period (e.g., for responsibilities related to childbirth, adoption, elder care, and medical leave) should be discussed as needed.
- Sample promotional documents should be provided by year 4 for CHS and year 3 for tenure (or earlier if requested by the assistant professor).

Mentoring and Career Resources

The [UW–Madison Institute for Clinical and Translational Research \(ICTR\)](#) offers resources for mentors and mentees focused on cultivating effective mentoring relationships, including information on mentoring best practices and the stages of a mentoring relationship.

[Faculty Central Resources](#), Office for Faculty Affairs and Development, UW School of Medicine and Public Health

Additional online mentoring resources are available at the [UW-Madison Center for the Improvement of Mentored Experiences in Research \(CIMER\)](#).

[Maximizing the Return on Investment in Your Mentoring Relationships](#), Nancy Raymond, MD, Associate Dean for Faculty Affairs and Development, UW School of Medicine and Public Health.

The [National Research Mentoring Network \(NRMN\)](#), funded by the National Institutes of Health, is a nationwide consortium of science professionals and institutions collaborating to provide students and scientists across all career stages of research in the biomedical, behavioral, clinical, and social sciences with enhanced networking, professional development, research resources and mentorship experiences. The NRMN offers mentorship and professional development programs for all career stages. [Membership is free](#).

The [Association of Professors of Gynecology and Obstetrics](#) (APGO) offers several teaching and learning tools for ob-gyn faculty members. APGO members are encouraged to utilize the online resources designed specifically for faculty development and community-based educators.

The APGO also has several books and awards available for advancing your career (available to APGO members)

[Career Development in Academic Medicine: Your Journey to Success](#) A valuable resource regardless of specialty or career stage, this digital publication offers guidance for physicians considering a career in academic medicine, for medical school faculty contemplating career direction and for medical school administrators seeking advice on how to establish and nurture excellent faculty at their institutions.

American Association of Medical Colleges (AAMC) Faculty Vitae. [The Educator Portfolio: A Tool for Career Development](#). Career development and advancement of all medical faculty members—from basic scientists to clinicians—involves documentation of educational accomplishments. A well-planned educator portfolio can play a key role in advancing your career as an educator.

The [AAMC's Minority Faculty Career Development Seminar](#). For junior faculty (senior fellows, instructors, and assistant professors) who are members of underrepresented minority groups and who aspire to attain positions of leadership in academic medicine.

The [AAMC's Early Career Women Faculty Leadership Development Seminar](#). Two seminars, one for early career faculty members and one for mid-career faculty members, are held annually. Both are directed to a multidisciplinary audience and emphasize women's leadership skills and opportunities for advancement.

AAMC's [Compact Between Postdoctoral Appointees and Their Mentors](#) is designed to support the development of positive mentoring postdoctoral relationships and offers a set of guiding principles to initiate discussions at both local and national levels. The compact was updated in 2017 by the [AAMC Group on Graduate Research](#).

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APPENDIX



Mentoring committee meeting summary for probationary faculty

Faculty Member Name:

Appointment Start Date:

Faculty Track:

Mentoring Committee Chair:

Mentoring Committee Members:

Percent effort: Teaching:

Research:

Clinical:

Mentoring meeting date:

CV, IDP and personal statement up to date?

Committee members in attendance:

Meeting Summary:

Activity	Achievements	Current Challenges
Clinical		
	Committee feedback:	
Service		
	Committee feedback:	
Teaching		
	Committee feedback:	
Research		
	Committee feedback:	
Leadership/ Community Engagement		
	Committee feedback:	

Committee recommendations and short-term goals

- Promotion timeline:
- Building national presence:
- Promotion guidance:

Progress toward promotion:

Area of Excellence:

Area of Significant Accomplishment:

General Comments:

Promotion probability this year:

Yes (seems likely and warranted) **No** (unlikely at this time)

For faculty within first 3 years of appointment:

Committee confirms that mentee is placed in correct faculty track (up to 3rd year of appointment): **Yes** **No**
(If no, notify Division Director and Department Chair)

Individual Development Plans

The individual development plan (IDP) is a tool to help in your career and promotion planning process. The IDP also **facilitates communication between mentees and mentors and can help align expectations for the mentoring relationship**. Discussing elements of your plan in collaboration with your mentoring committee means they are aware of and have invested in advising you on your career goals and the proposed timeline to achieve them. IDPs include sections for self-assessment and reflection; career choices and pathways; short- and long-term goals; and ways to achieve and implement those goals.

The department suggests creating an IDP within the first 3 months as an assistant professor and reviewing it with your division director. Once the initial IDP is completed, a dynamic document can be reviewed and updated biannually with your mentoring committee. Updating the IDP for each mentoring committee meeting can help you as the mentee stay on track and allow mentors to suggest career resources in real time and preemptively identify potential barriers. Mentees can also use the IDP to advocate for their career advancement (e.g. justify participation in professional development activities that will help achieve goals/learning objectives as agreed on in the IDP).⁸

Beyond serving as a valuable career tool for your use as a mentee, an IDP is a requirement for all those supported by NIH training grants or career development awards (graduate students, postdoctoral fellows and junior faculty). As a current or future mentor of these trainees, there is an additional benefit of developing familiarity with the IDP. Career planning tools are also advantageous when applying for Mentored Career Development Awards, where applicants are required to provide detailed training and career plans. If still skeptical, there is research that suggests career impact. One study found that people who use professional development plans such as the individual development plan rank themselves higher on indices of success and achieve greater success within science and other fields according to some metrics⁹. A second study¹⁰, based on information provided by 7,600 postdoctoral scientists at 46 American research institutions, showed that compared to peers without a written plan, post docs who begin their appointment with an IDP *developed in collaboration with their mentors*:

- Are 23% more likely to submit papers to peer-reviewed journals.
- Publish first-authored papers at a 30% higher rate.
- Are 25% less likely to report that their mentor did not meet their initial expectation.

Tips for Preparing Individual Development Plans (IDPs)* For Mentors and Mentees

An **IDP provides a process to identify career goals and objectives**. It serves as a **communication tool between mentee and mentor**.

Goals of an IDP: Help individuals identify:

- Long-term career options for a mentee to pursue and how to best pursue these options, and
- Short-term need for improving current performance.

Benefits: A clearer sense of expectations and milestones to achieve and advance in the system.

The IDP Process: These 4 steps are meant to be interactive; both mentee and mentor must participate fully in the process.

THE MENTEE

Step 1. Conduct a Self-Assessment.

- Assess your skills, strengths and areas that need development.
- Take a realistic look at your current abilities. This is a critical part of career planning. Ask your peers, mentors, family and friends what they see as your strengths and your development needs.
- Outline your long-term career objectives. Ask yourself:
 - What type of work would I like to be doing?
 - Where would I like to be in this organization?
 - What is important to me in a career?

Step 2. Survey Opportunities with Mentor.

- Identify career opportunities and select from those that interest you.
- Identify developmental needs by comparing current skills and strengths with those needed for your career choice.
- Prioritize your developmental areas and discuss how these should be addressed with mentor.

Step 3. Write an IDP.

An IDP maps out your general path and helps match skills/strengths to your career choices. It is a changing document; needs and goals will almost certainly evolve over time. The aim is to build from your current strengths and skills by identifying areas for development and providing a way to address these.

- Discuss your draft IDP with your mentor(s).
- Revise the IDP as appropriate.

Step 4. Implement Your IDP.

- Put your plan into action.
- Revise and modify plan as necessary; it is not cast in stone and needs to be modified as circumstances and goals change. The challenge is to be flexible and open to change.
- Review the plan with your mentor regularly. Revise the plan based on these discussions.

THE MENTOR:

Step 1. Become familiar with available opportunities.

By virtue of your experience, you should already have knowledge of the mentee's career opportunities, but you may want to familiarize yourself with other career opportunities and trends.

Step 2. Discuss opportunities with mentee.

This needs to be a private, scheduled meeting, distinct from regular research-specific meetings. There should be adequate time set aside for an open and honest discussion.

Step 3. Review IDP and help revise.

Provide honest feedback - both positive and negative - to help mentee set realistic goals. Agree on a development plan that will allow your mentee to be productive in the research and adequately prepared for the next step in their career advancement.

Step 4. Establish regular review of progress.

A mentor should meet at regular intervals with mentee to assess progress, expectations and changing goals. Every 6 months, you should conduct a performance review to assess accomplishments and what needs to be done next. A written review is most helpful in objectively documenting accomplishments.

**Adapted from: UCSF Clinical & Translational Science Institute Mentor Development Program*



Department of Obstetrics and Gynecology

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The Ob-Gyn Individual Development Plan (IDP) is applicable for all faculty tracks and rank. Consider it a communication tool between mentee and mentor. The IDP is a living document to revisit and update as needed to reflect progress and changes in career goals.

Individual Development Plan*

1. **Name:**
2. **Date range:**
3. **Academic Series (CHS, CT, Tenure):**
4. **Academic rank (Assistant, Associate, Full Professor):**
5. **Review your Academic Series requirements as needed** (see Promotional Guidelines for Series/Rank on the [UW SMPH Intranet](#))

4. Identify Personal and Institutional Long-Term Goals

What do you personally hope to accomplish in your career?

List other goals discussed with department chair/division director

Identify personal short-term goals (3-5 years)

5. Areas of Focus: Definition and Distribution of Effort

The following five areas of focus generally describe the areas where faculty direct their efforts to successfully accomplish their personal, institutional and academic series goals. Faculty in Ob-Gyn have varying roles and responsibilities. Focus only on your development needs in areas pertinent to your career.

1. Teaching—Excellence in Education

Training medical students, residents, fellows, other clinical and/or public health learners. Student teaching, training in research methods, student advising, CME/curriculum teaching /involvement, new course development, etc.

2. Research—Excellence in Research

Conducting basic science and/or clinical research, presentations and publications, funding and grant support and application, copyrights and patents, editing, and peer review. Pursuing high quality research anywhere along the continuum from basic, clinical, translational and population approaches.

3. **Clinical Care—State-of-the-Art Clinical Care**
Provision of care to patients, clinical care, and/or public health activities, chart reviews, related clinical activities, clinical budget performance.
4. **Service—Leadership and Program Development**
Participation or leadership in governance, committee membership, collegial activities. Suggested service priority: department, School of Medicine and Public Health, University, professional, community, program leadership that advances the missions of the SMPH.
5. **Self Development—Networking, Work/Life Balance and Additional Mentors**
Faculty Development activities, leadership programs, CME training, earning advanced degrees, participation in professional academic associations or societies, developing professional contacts, consulting in one’s field, expanding network contacts, balancing work and personal life activities, utilizing additional mentors in specific areas of focus.

Distribution of Effort: Estimate the hours per week spent in each focus area and then list the % of total duties. Only complete the areas that apply. Otherwise, list non-applicable (N/A).

Focus Area	# Hours/Week	% of Total Duties
Teaching		
Research		
Clinical Care		
Service		
Self-Development		
Total		

6. Specific Goals in Focus Areas

Complete the focus areas that specifically apply to the criteria for your Academic Series and therefore will help you accomplish your personal and institutional long-term goals. Other focus areas may not apply to your career goals and can be left blank or labeled non-applicable (N/A).

TEACHING

Please list recent goal(s) and significant accomplishments (teaching appointments, invitations, course or program improvements, etc.). If goal not met, explain and identify barriers.

Recent teaching goals and significant accomplishments:

Short-term (6-12 month) teaching goal(s):

Identify resources, collaborators, and time commitment needed to achieve goal(s):

Identify potential barriers to achieve new goal(s):

RESEARCH AND RESEARCH-RELATED ACTIVITIES

Please list recent goal(s) and significant accomplishments (major publications, grants, presentations, invitations, etc.). If goal not met, explain and identify barriers.

Recent research goals and significant accomplishments:

Short-term (6-12 month) research goal(s):

Identify resources, collaborators, and time commitment needed to achieve goal(s):

Identify potential barriers to achieve new goal(s):

CLINICAL CARE

Please list recent goal(s) and significant accomplishments (exceptional patient care, development of new techniques, clinical programs, etc.). If goal not met, explain and identify barriers.

Recent clinical goals and significant accomplishments:

Short-term (6-12 month) clinical goal(s):

Identify resources, collaborators, and time commitment needed to achieve goal(s):

Identify potential barriers to achieve new goal(s):

SERVICE/LEADERSHIP

Please list recent service/leadership goal(s) and significant accomplishments. If goal not met, explain and identify barriers.

Recent service goals and significant accomplishments:

Short-term (6-12 month) service/leadership goal(s):

Identify resources, collaborators, and time commitment needed to achieve goal(s):

Identify potential barriers to achieve new goal(s):

SELF-DEVELOPMENT

Please list recent goal(s) and significant accomplishments. If goal not met, explain and identify barriers.

Recent self-development goals and significant accomplishments:

Short-term (6-12 month) self-development goal(s):

Identify resources, collaborators, and time commitment needed to achieve goal(s):

Identify potential barriers to achieve new goal(s):

7. Optimal Distribution of Effort

Revisit the table, "Distribution of Effort," in step 5. Create a new Optimal Distribution of Effort table, taking into account your specific goals listed in step 6.

Focus Area	# Hours/Week	% of Total Duties
Teaching		
Research		
Clinical Care		
Service		
Self-Development		
Total		

*Adapted from IDP form presented by Russell G. Robertson MD, Medical College of Wisconsin, 2004 AAMC Faculty Affairs Professional Development Conference.

www.ucdmc.ucdavis.edu/facultydev/docs/NewCareerMntrgIDP.rtf.

MENTORING PLAN WORKSHEET*

YOUR GOALS

Take some time to think about and write down your research and professional goals. You may want to articulate one- and five-year goals. For example, a short-term goal might be “to complete a pilot study” and a long-term goal might be “to have enough publications to get promoted.”

Take some time to think about and write down your clinical, research and professional goals. You may want to articulate one- and five-year goals. For example, a short-term goal might be “to review promotional guidelines” and a long-term goal might be “to assume a leadership role in your professional society.”

Short-term Goals (next year)	Long-term Goals (next 5 years)
1.	1.
2.	2.
3.	3.

IDENTIFY MENTORSHIP NEEDS

Identify competencies that you will need to gain expertise in to reach your goals (see Table below for examples). Identify people who can assist you in achieving these competencies and in meeting your goals. These can be mentors within your department, or from other departments in the UW School of Medicine and Public Health. A blank grid is included on the next page to help you organize your thoughts. Put your initial thoughts down on paper before you approach a mentor, and then revise it as your relationship changes.

Designing research	Establishing goals
Writing grants	Finding funding
Managing your career	Managing staff
Leading teams	Preparing for promotion
Cultural competence	Navigating institution
Organizational dynamics	Managing conflict
Speaking before groups	Knowing career paths
Teaching effectively	Hiring personnel
Collaborating effectively	Managing budgets
Managing data	Mentoring others
Giving feedback	Evaluating literature
Assessing students	Medical informatics

POTENTIAL MENTORS

Identify people who can assist you in developing the competencies you identified and therefore help you to reach your goals. For each potential mentor, identify objectives, develop a list of what you can offer and propose outcomes. Put your initial thoughts down on paper before you approach a mentor, and then revise it as your relationship changes.

APPROACHING MENTORS

We suggest that you first approach mentors by sending an e-mail that includes a request for a meeting, a brief summary of your goals and why you think there would be a good fit between you and the mentor. Let potential mentors know how you are hoping to work with them, such as one-on-one, as one of many mentors, or as part

of a mentoring team or committee. You might want to let them know how you think they would be able to contribute.

MANAGING RELATIONSHIPS WITH YOUR MENTORS

Relationships should be nurtured and respected. If you and your proposed mentor develop a working relationship, have some guidelines for how you will work together. Here are some tips:

- ❖ Schedule standing meetings ahead of time and keep them.
- ❖ Give your mentor(s) plenty of time to review drafts of grants and manuscripts.
- ❖ Don't be a black hole of need – limit the number of requests you make of any given mentor.
- ❖ Develop authorship protocols so that expectations are clear.
- ❖ Saying thank you is priceless.

Mentoring Plan					
<i>Mentor</i>	<i>Long and/or Short Term Goal (e.g. lead a research group)</i>	<i>Competency (e.g. learn how to mentor)</i>	<i>Activity (e.g. mentor a medical student)</i>	<i>What I can offer (e.g. increase research group's capacity to do research)</i>	<i>Outcome (e.g. increased research productivity)</i>

*Adapted from Ann J Brown, MD MHS, Vice Dean for Faculty, Duke University School of Medicine.
<http://facdev.medschool.duke.edu>

Mentorship Agreement Template

The purpose of this template is to assist you in documenting mutually agreed upon goals and parameters that will serve as the foundation for your mentoring relationships. While mentors and mentees may find mentorship agreements to be useful, they are optional. This template is expected to be altered to meet individual needs.

- [1] **Goals** (what you hope to achieve as a result of this relationship; e.g., gain perspective relative to skills necessary for success in academia, explore new career opportunities/alternatives, obtain knowledge of organizational culture, networking, leadership skill development, etc.):

- [2] **Steps to achieving goals** as stated above (e.g., meeting regularly, manuscripts/grants, collaborating on research projects, steps to achieving independence, etc.):

- [3] **Confidentiality**: Any sensitive issues that we discuss will be held in the strictest of confidence. Issues that are off limits for discussion include:

- [4] **Plan for evaluating relationship effectiveness** (e.g., bi-annual review of mentorship meeting minutes, goals, and outcomes/accomplishments):

[5] **Relationship termination clause:** In the event that either party finds the mentoring relationship unproductive and requests that it be terminated, we agree to honor that individual's decision without question or blame.

[6] **Duration:** This mentorship relationship will continue as long as both parties feel comfortable with its productivity or until: _____

Mentor's Signature _____

Mentee's Signature _____

Date _____

Mentoring Agreement Form

We are voluntarily entering into a mentoring relationship that we expect will benefit both parties. This agreement sets the parameters of the relationship, including the expectation that we will continually evaluate the relationship to ensure it meets both our needs. Other elements of the relationship are:

Confidentiality:

Frequency of meetings/ anticipated duration of the relationship:

Approximate time investment of Mentor: _____

Specific role of Mentor:

Expectations of Mentee:

Additional Points:

Mentee: _____ Date: _____

Mentor: _____ Date: _____

Adapted from <https://hr.duke.edu/sites/default/files/atoms/files/Mentoring%20Agreement.pdf>

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Mentoring Timelines by Promotional Track

Click on Track of interest

[CHS Track](#)

[CT Track](#)

[Tenure Track](#)

CHS Track Timeline			
	Assistant	Associate	Professor
Onboarding	<p style="text-align: center;"><u>Peer Partner Assigned</u> <i>Goal: Provide guidance on day-to-day aspects of working in Ob-Gyn Department and at UW</i></p> <p style="text-align: center;">Meet with Promotions Coordinator <i>Goal: Introduction to Department resources available to support career development and promotion</i></p> <p style="text-align: center;">Meet with Vice Chair of Faculty Development and Associate Director of Mentoring <i>Goal: Discuss mentoring plan</i></p> <p style="text-align: center;">Complete <u>Ob-Gyn individual development plan document (IDP)</u> <i>Goal: Develop a career plan for faculty appointment in Ob-Gyn Department and at UWSMPH</i></p>		
3-6 months after hire	<ul style="list-style-type: none"> • Work with division director to select mentoring committee (chair + 2 faculty from within or outside department, based on your needs) • Review letter of appointment and promotional guidelines for CHS track • Assistant Professor’s MPA schedules first mentoring committee meeting • Prepare for mentor meetings <ul style="list-style-type: none"> ✓ Review best practices for mentees ✓ Review best practices for mentors ✓ Consider areas of excellence and significant accomplishment ✓ Develop draft of personal statement 		
Annually	<ul style="list-style-type: none"> • Faculty Annual Performance Review by division director or department chair; includes annual peer reviews (2) (see Annual Performance meeting checklist for details on materials and responsibilities) • Peer review of teaching completed years 2, 4 and 5 if Education is identified as Area of Excellence or Area of Significant Accomplishment for promotion (Use Ob-Gyn Peer Review of Teaching form) • Work with your administrative assistant to update academic activities monthly in the SAM system • Update CV at least annually; see SMPH guidelines for CV format using CHS Track criteria • Review success of mentoring committee to meet mentee’s career development needs. 		
Ongoing	<p>Document activities that contribute to promotion readiness:</p> <ul style="list-style-type: none"> • Clinical/Public Health, Education, Research, and Leadership -see guidelines for CHS promotion • Each faculty with a mentoring committee will have a folder within the “Ob-Gyn Mentoring” Folder (on UW Box), with editor privileges 		

	<ul style="list-style-type: none"> File notes from meetings with mentors and mentoring committee (see Mentoring Committee Meeting Procedures for details) 		
Within first 2 years	Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office)		
Mentoring	<p>Quarterly: Recommend meeting with mentoring committee chair quarterly in year 1</p> <p>Semi- annually for first three years: Meet with mentoring committee and/or mentoring committee chair</p> <p>Annually from year 3: Meet at least annually with mentoring committee</p> <ul style="list-style-type: none"> ✓ Review and update IDP & CV ✓ Develop draft of personal statement ✓ Review mentoring needs <p>Work with committee to prepare for and determine point of readiness for promotion.</p>		
Preparation for Promotion Years 5-6	<p>Review promotion readiness with mentoring committee and division director and/or department chair as needed.</p> <p>Prepare promotion packet with administrative staff support.</p> <ul style="list-style-type: none"> ✓ Present updated draft of personal statement <p>Attend SMPH Pathways to Promotion 102 (offered annually by the SMPH Faculty Development office)</p>	<p>Promotion review – process set up at time of annual review for selected year – may elect to participate ONLY in Annual Review Process</p> <p>Review promotion readiness with mentoring committee and/or mentoring committee chair</p> <p>Prepare promotion packet with support of administrative staff</p>	<p>5 years after Promotion</p> <p>Post-promotion review – process set up at time of annual review for selected year</p>
Promotion Documents	<ul style="list-style-type: none"> UW SMPH Intranet: See Faculty Appointment and Promotion documents for CHS Track 		

CT Track Timeline			
	Assistant	Associate	Professor
Onboarding	<p style="text-align: center;"><u>Peer Partner</u> Assigned <i>Goal: Provide guidance on day-to-day aspects of working in Ob-Gyn Department and UW</i></p> <p style="text-align: center;">Meet with Promotions Coordinator <i>Goal: Introduction to Department resources available to support career development and promotion</i></p> <p style="text-align: center;">Meet with Vice Chair of Faculty Development and Associate Director of Mentoring <i>Goal: Discuss mentoring plan</i></p> <p style="text-align: center;">Complete <u>Ob-Gyn individual development plan document (IDP)</u> <i>Goal: Develop a career plan for faculty appointment in Ob-Gyn Department and at UWSMPH</i></p>		
6-12 months after hire	<ul style="list-style-type: none"> • Review letter of appointment and promotional guidelines for CT track • Work with division director to: <ul style="list-style-type: none"> Set professional goals Determine need/desire for mentor(s) • As appropriate: <ul style="list-style-type: none"> Select mentor(s) Schedule 1st mentoring committee meeting 		
For those with mentoring committee	<ul style="list-style-type: none"> • Meet with mentoring committee • Determine meeting schedule. Prepare for mentor meetings <ul style="list-style-type: none"> ✓ Review best practices for mentees ✓ Review best practices for mentors ✓ Develop draft of personal statement 		
Annually	<ul style="list-style-type: none"> • Faculty Annual Performance Review by division director or department chair; includes annual peer reviews (2) (see Annual Performance meeting checklist for details on materials and responsibilities) • Work with your administrative assistant to update academic activities monthly in the SAM system • Update CV annually: see SMPH CV format for C-T Track 		
Ongoing	<p>Document activities that contribute to promotion readiness, including:</p> <ul style="list-style-type: none"> • Clinical/Public Health, Education, Research, and Leadership – see guidelines for CT promotion- • Each faculty with a mentoring committee will have a folder within the “Ob-Gyn Mentoring” Folder (on Box), with editor privileges 		

	<ul style="list-style-type: none"> File notes from meetings with mentors and mentoring committee (see Mentoring Committee Meeting Procedures for details) 		
Within first 2 years	Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office)		
(TBD: Year 1 – 5)	<p>Annually Update IDP with peer partner, mentor, and/or division director</p> <p>Determine if on track for career and promotion goals</p> <p>Attend SMPH Pathways to Promotion 102 (offered annually by the SMPH Faculty Development office)</p>		
Preparation for Promotion	<ul style="list-style-type: none"> Review promotion readiness Determine, with division director and faculty development team Prepare promotion packet as appropriate with administrative staff support <p>(Use these same steps for Associate to Professor promotion)</p>	<ul style="list-style-type: none"> Post-promotion review – process set up at time of annual review for selected year May elect to participate ONLY in Annual Review process 	<ul style="list-style-type: none"> Post-promotion review – process set up at time of annual review for selected year May elect to participate ONLY in Annual Review process
Promotion Documents	<ul style="list-style-type: none"> UW SMPH Intranet: Faculty Appointment and Promotion documents for CT Track 		

TENURE Track Timeline			
	Assistant	Associate	Professor
Onboarding	<p style="text-align: center;"><u>Peer Partner</u> Assigned <i>Goal: Provide guidance on day-to-day aspects of working in Ob-Gyn Department and at UWSMPH</i></p> <p style="text-align: center;">Meet with Promotions Coordinator <i>Goal: Introduction to Department resources available to support career development and promotion</i></p> <p style="text-align: center;">Meet with Vice Chair of Faculty Development and Associate Director of Mentoring <i>Goal: Discuss mentoring plan</i></p> <p style="text-align: center;">Complete <u>Ob-Gyn individual development plan document (IDP)</u> <i>Goal: Develop a career plan for faculty appointment in Ob-Gyn Department and at UWSMPH</i></p>		
3-6 months after hire	<ul style="list-style-type: none"> • Work with division director to select departmental mentoring committee (chair + at least 2 faculty from within or outside department, based on your needs) • Review letter of appointment and promotional guidelines for tenure track • Assistant Professor’s MPA schedules first mentoring committee meeting • Prepare for mentor meetings <ul style="list-style-type: none"> ✓ Review best practices for mentees ✓ Review best practices for mentors ✓ Develop draft of personal statement ✓ Consider areas of excellence and significant accomplishment 		
Annually	<ul style="list-style-type: none"> • Faculty Annual Performance Review by division director or department chair; includes 2 peer reviews (see Annual Performance meeting checklist for details on materials and responsibilities) • Peer review of teaching completed (Use Ob-Gyn Peer Review of Teaching form) (years 2, 4 and 5) • Work with your administrative assistant to update academic activities monthly in the SAM system • Update CV at least annually; see SMPH guidelines for Promotion on the Tenure Track • May request “Progress to promotion” advisory review of readiness for promotion 		
Ongoing	<p>Document activities that contribute to promotion readiness, including:</p> <ul style="list-style-type: none"> • Research, Teaching, Service and Leadership – see Guidelines for Tenure – • Each faculty with a mentoring committee will have a folder within the “Ob-Gyn Mentoring” Folder (on UW Box), with editor privileges where key materials and ongoing CV updates may be filed. 		

	<ul style="list-style-type: none"> File notes from meetings with mentors and mentoring committee (see Mentoring Committee Meeting Procedures for details) 	
Mentoring: During first 3 years	<p>Every 1-2 months: Recommend meeting with research mentors – lay strong foundation for research and timely submission of publications and grants</p> <p>Every 4-6 months: Meet with mentoring committee or mentor chair, and/or with program mentors if supported by a NIH Training Grant or Career Development Award</p> <p>Annually: Meet at least annually with mentoring committee (Mentee’s MPA schedules meetings)</p> <ul style="list-style-type: none"> ✓ Review IDP and mentoring needs ✓ Update draft of personal statement ✓ Evaluate current career track placement, progress and goals in areas of excellence and significant achievement 	
Within first 2 years	Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office) and attend the UW Biological Sciences Division Tenure Workshop	
Mentoring: From year 3 to promotion	<p>Annually: Meet at least annually with departmental mentoring committee</p> <ul style="list-style-type: none"> ✓ Review and update IDP and CV ✓ Present updated draft of personal statement ✓ Review mentoring needs <p>Work with committee to prepare for and determine point of readiness for promotion.</p> <p>Attend SMPH Pathways to Promotion 102 (offered annually by the SMPH Faculty Development office)</p>	

Preparation for Promotion Years 4-5	<p><i>Review promotion readiness</i> with mentoring committee and division director, and as needed the department chair</p> <p><i>Prepare promotion packet</i> with administrative staff support</p>	<p><i>Promotion review</i> – process set up at time of annual review for selected year</p> <p><i>Review promotion readiness</i> with mentoring committee</p> <p><i>Prepare promotion packet</i> with support of administrative staff</p>	<p>5 Years after promotion</p> <p>Post-promotion review – process set up at time of annual review for selected year</p>
Promotion Documents	<p>UW SMPH Intranet: See Faculty Appointment and Promotion documents for Tenure Track</p>		