

# **Mentoring**

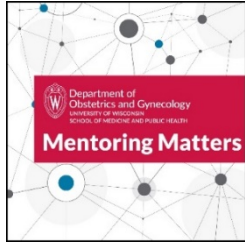
**Be a Mentor...Be the Difference**



## **Mentoring and Promotions Handbook: A Guide for Faculty**



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



*Acknowledgements:* This is the 3<sup>rd</sup> edition of a Mentoring and Promotions Handbook for faculty in the Obstetrics & Gynecology Department. This version incorporates important changes that are being implemented in 2021 by the Office of Faculty Affairs and Development in the School of Medicine and Public Health (SMPH) with regard to the roles of committees responsible for overseeing promotion and providing mentoring.

Content in this handbook is based in part on the work led by Nancy Raymond, Associate Dean of Faculty Affairs and Development and two mentoring subcommittees of the SMPH Council of Faculty Development Liaisons in 2020 (subcommittee members: Pam Asquith, Mark Connelly, Sharen Gehl, Ellen Hartenbach, Jana Jones, Randy Kimple, Mary Poellinger, Jessica Robbins, Rebecca Sippel, Jennifer Smilowitz, Christine Sorkness, Anne Stahr, Corrine Voils).

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March 1, 2021



## Department of Obstetrics and Gynecology

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 and Promotions Program is to support the professional development, success and well-being of all faculty in the department. We hope you will find this Mentoring and Promotions Handbook for Faculty 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

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## Introduction

The goal of this handbook is to provide guidelines, procedures and best mentoring practices to support the career growth and timely promotion of faculty in the Department of Obstetrics & Gynecology. In recommending these best practices for promotion oversight committees and mentoring, the Department of Obstetrics & Gynecology is honoring our commitment to the success and well-being of our faculty. The handbook offers mentoring pearls and resources for faculty at all career stages.

In this new edition of the handbook we draw a distinction between the functions of oversight, mentorship and sponsorship of faculty. The function of oversight is to assure that the assistant professor is meeting expected milestones along their path to promotion to associate professor. Mentorship involves career guidance, feedback and support, whereas sponsorship involves advocacy by someone who can influence decision-making processes or structures. Sponsorship is a very important skill for senior faculty and leaders in academic medicine to acquire and develop. Importantly, mentors can provide sponsorship, but sponsorship can also be provided by individuals who do not have an ongoing mentoring relationship with the person whom they sponsor.

Faculty at all career stages benefit from strategies designed to maintain and increase their productivity and joy in their careers<sup>1</sup>. One of the most important of those strategies is mentoring. 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 effectiveness<sup>2</sup>;
- Research productivity<sup>3, 4</sup>;
- Professional socialization and interactions with colleagues<sup>5</sup>;
- Salary levels and satisfaction with salary and promotion<sup>6</sup>.

Effective mentoring is also key to the recruitment and retention of a diverse faculty. Research on new faculty shows important findings<sup>7</sup> in organizing effective faculty mentoring systems. In particular, a longitudinal study revealed that underrepresented faculty in academic medicine attributed their success to access and support of senior faculty mentors, peer networking, professional skill development, and knowledge of institutional culture<sup>8</sup>. Promoting a culture that values mentoring reflects the Department of Obstetrics & Gynecology's commitment to [diversity, equity and inclusion](#).

At the University of Wisconsin Department of Obstetrics and Gynecology, we value and promote an inclusive environment that respects, welcomes and embraces differences including, but not limited to race, gender, gender identity, ethnicity, language, sexual orientation, age, physical or mental ability, religion, income, and national origin. Through these efforts, we seek to make the department more welcoming and inclusive, increase diversity among faculty, staff, trainees and collaborators, incorporate antiracism principles throughout the department, and improve the patient experience and health outcomes for women from underrepresented groups.

## Promotion Oversight and Guidance

Although informal mentoring is an important component of academic life, formal mentoring and oversight structures such as the Promotion Oversight 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 Mentoring and Promotions Handbook focuses on **best practices for promotion oversight committees**. The Department of Obstetrics & Gynecology has a formal program for oversight and guidance for clinician health sciences (CHS) and tenure track faculty since these are probationary tracks and promotion is a requirement for ongoing employment. Although historically these committees have been referred to as Mentoring Committees within our department and the School of Medicine and Public Health (SMPH), in the future the SMPH will refer to these committees as Promotion Oversight Committees to reflect their function. Although Promotion Oversight Committees do provide some mentoring functions, most faculty benefit from mentorship that requires more frequent input and different expertise. In the mentoring section of this handbook, we further discuss aspects of mentoring that can benefit early-career faculty on all tracks.

### Overview of the Promotion Oversight Committee (POC)

Departmental promotion oversight committees for assistant professors on the CHS and tenure track meet with probationary faculty to monitor progress toward promotion. Within the first year of their appointment, each assistant professor on the CHS and tenure track will be assigned a Promotion Oversight Committee (POC). This committee will meet with the assistant professor at least annually, but preferably twice a year with suggested meeting times in the spring and fall. The function of the committee is to ensure that the assistant professor is meeting expected milestones along their path to promotion to associate professor. The committee will provide general career guidance and recommendations to the assistant professor. After the fall meeting, the POC committee chair will forward the meeting minutes and summary of progress to promotion to the division director and chair to be considered in the annual review process. The POC committee chair will provide a summative statement to the department chair and executive committee regarding the assistant professor's progress relative to the time in position and readiness to submit the dossier for promotion.

The primary function of the POC is to review the progress of the assistant professor in order to ensure progression along an expected academic trajectory and the assistant professor is on track to achieve promotion. A secondary function of the POC is to provide general career guidance with the aim of furthering the assistant professor's scholarly pursuits. In the first three years, the POC is expected to evaluate if the assistant professor is on the appropriate faculty track. If the assistant professor and the POC determine that the track placement is inappropriate, the POC should recommend and facilitate a track change per the SMPH policy on track changes.

The POC will also provide general career guidance and advocacy on behalf of the assistant professor. The chair of the POC must ensure that the assistant professor has adequate and appropriate academic career mentorship. If adequate mentorship does not come from members of the POC, the chair of the POC will help the assistant professor identify appropriate mentors either through direct recommendations or facilitating a conversation between the assistant

professor and their chair/division head. The assistant professor may discuss questions and seek advice from the committee on specific clinical or academic challenges. If the POC believes that the assistant professor has areas in need of improvement, the POC will discuss this with the assistant professor and provide recommendations.

**The primary role of the promotion oversight committee is to provide valuable and effective guidance to assistant professors with regard to promotion.**

- Review key promotion guides
- Discuss CHS/tenure academic clock, clock extensions
- Discuss different areas of academic focus
  - CHS: Clinical/Public Health, Teaching, Research, Institutional Leadership
  - Tenure: Research, Education, Service, Outreach
- Begin to probe areas of interest and help the early-career faculty member think about how their areas of interest might fit into the various areas of focus
- Provide or point out helpful resources for faculty
  - SMPH Pathways to Promotion seminars
  - SMPH Office of Faculty Affairs and Development (OFAD) professional development resources as well as the most up to date promotions guidelines (<https://intranet.med.wisc.edu/faculty-affairs-and-development/>)
  - SMPH Faculty Mentoring Guide and OFAD mentoring resources
  - Support from the Ob-Gyn Promotions Coordinator and Vice Chair for Faculty Development
- Discuss mentoring (its importance, forms of mentoring as options)
  - If mentorship does not come from members of the POC, the chair of the POC will help the assistant professor identify a mentor either through direct recommendations or facilitating a conversation between the assistant professor and the chair/division director.

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

#### **Promotion Oversight Committee Chair**

- The **POC chair** initially meets 1:1 with the **assistant professor** in advance of the initial promotion oversight committee meeting to review their Individual Development Plan. At the subsequent promotion oversight committee meetings, the promotion oversight committee chair facilitates the discussion during which the committee members review faculty progress and provide career advice.
- The **promotion oversight committee chair** either prepares the promotion oversight committee minutes personally or reviews and edits the promotion oversight committee meeting minutes prepared by a designated administrative note taker. In either case, the promotion oversight committee chair is responsible for ensuring that within two weeks, the finalized promotion

oversight committee meeting minutes are uploaded to the early career member's mentoring and promotions folder on Box and sent via email to the faculty member, their division director, the department promotions coordinator, and the department chair.



## Clinical Health Sciences Track Faculty

Faculty on the CHS track are engaged in clinical or public health duties that generally comprise 50% or more time and effort while the remainder of the work is related to teaching, research or administrative duties. A scholarly approach and external reputation for clinical and academic duties in the domain of clinical/public health activity, education, research or institutional leadership is required for promotion. The specific SMPH guidelines for promotion on the CHS track are shared with faculty at the time of appointment. The POC will provide faculty with an objective assessment of performance relative to the CHS guidelines and counsel faculty on early career development. This will assist the faculty in achieving academic and clinical goals. Consideration for promotion is after five years and potential areas of focus include excellence in clinical/public health, education, research, or institutional leadership. The Ob-Gyn [Timelines by Promotional Track](#) is a resource to guide POC. 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](#).

**CHS POC Suggestions by Year (Y 1-5)** (See [CHS Promotions Timelines](#) for overview)

### Year 1

1. Create an Individual Development Plan (IDP)
2. Develop areas of academic focus based on interest from prior training in residency, fellowship and/or graduate school
3. Sign up to give medical student, resident, and/or fellow lectures
4. Join the speaker's bureau in SMPH Office of Continuing Professional Development (OCPD) or work with the UW Health physician liaison office to give regional CME talks on your area of interest
5. Submit an abstract to ACOG or specialty society annual meeting
6. Author at least one manuscript
7. Work on a departmental women's health podcast
8. Sign up for at least one departmental committee (education, clinical operations, research, faculty development, DEI, wellness, others)
9. Volunteer to provide peer review for one or two journals in clinical or academic specialty area
10. Attend semi-annual departmental Faculty Development Series workshops
11. Structure CV in the SMPH format available on the Office of Faculty Affairs and Development website
12. Develop an organized system (electronic, paper or combined) with the administrative assistant to track and document all academic activities
13. Keep all evaluations of teaching activities, including CME events
14. Block time on the calendar for a calendar review and documentation of activities
15. Update CV monthly or at least every three months

16. Meet with the POC once or twice a year and request necessary mentoring

### **Years 2-3**

1. Identify the two areas of scholarship (clinical, education, research, leadership)
2. Update the IDP
3. Ensure correct SMPH faculty track placement
4. Set goals with the POC committee and division director/chair
5. Maintain files documenting academic productivity
6. Present at departmental, local, and regional forums
7. Reach out to the Interprofessional Continuing Education Partnership (ICEP) at UWSMPH and join other colleagues to develop multidisciplinary continuing medical education programs
8. Volunteer to give a talk at the Wisconsin ACOG section meeting
9. Apply for a departmental Faculty Development Grant to obtain a new skill
10. Continue to develop current projects—apply for a department R&D grant
11. Write at least 1-2 peer review papers a year, as first or last author on most
12. Provide mentorship for a resident or fellow on their research project
13. Select committees and activities carefully to augment academic work rather than distract
14. Learn the art of self-promotion
15. Learn how to gracefully decline requests for academic activities outside the area of academic focus
16. Ensure that colleagues and supervisors know type and relevance of academic work
17. Develop relationships with people at other institutions through ACOG, specialty organization or other groups—these people can write arm's length letters for promotion
18. Write an early draft of the personal statement to tell the story of impact; share the personal statement with the promotions oversight committee/division director/chair
19. Meet with the POC once or twice a year and request necessary mentoring
20. Annual career and promotion track goals assessment (track transfer to tenure can be considered in the first three years of CHS appointment)
21. POC Chair reviews correct track placement for assistant professors for each of the first 3 years of appointment.

### **Years 4-5**

1. Finalize the two areas of scholarship: 1) the basis of promotion with one area of excellence and 2) one area of significant accomplishment (clinical, education, research, leadership)
2. Update the IDP
3. Set goals with the POC and division director/chair

4. Offer to give Grand Rounds at peer institutions (the division director and chair can help with introductions)
5. Submit abstracts to ACOG or specialty society annual meeting
6. Continue to write at least 1-2 papers a year, as first or last author on most
7. Identify the exact role in each manuscript as required by the CHS promotions committee (concept development and design, mentoring, data acquisition, analysis, writing)
8. Continue to work as a peer reviewer
9. Identify the impact of area of excellence and significant accomplishment in the medical community
10. Finalize personal statements and CV in SMPH format
11. Finalize list of potential evaluators (including 2 arm's length evaluators, individuals from outside the UW School of Medicine and Public Health that have no vested interest in the candidate's success or attainment of promotion)
12. Meet with the POC once or twice a year and request necessary mentoring

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

### **Ob-Gyn Promotion Oversight Committee Meeting Procedures for assistant professors on the CHS track**

1

- **Promotion oversight committee meetings are scheduled** by the committee chair with assistance from their medical program assistant (MPA).
- **At a minimum, the POC must meet each fall to review progress to promotion.**
- **At least 2 weeks in advance** of the promotion oversight 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 early career faculty materials are in the faculty mentee's folder in advance of the meeting.

2

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

3

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

## Tenure Track Faculty

Tenure track faculty in the Department of Obstetrics & Gynecology generally have less than 50% clinical responsibilities or are non-clinical faculty engaged full time in research, teaching, service or outreach. The specific guidelines for promotion on the tenure track are shared with faculty at the time of appointment. The POC will provide faculty with an objective assessment of performance relative to the tenure guidelines and counsel faculty on early career development. This will assist the faculty in obtaining their academic, clinical and research goals. Application for promotion is required after five years and potential areas of focus include excellence in research, teaching, service or outreach. The Ob-Gyn [Mentoring Timelines by Promotional Track](#) is a resource to guide the POC. 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](#).

**Tenure POC Suggested by Year (Y 1-5)** (See [Tenure Promotions Timelines](#) for overview)

### Year 1

1. Decide the initial research focus and investigate paths to funding
2. Form the research environment and team as per startup package/plans
3. Meet with the POC chair and then the full committee to discuss these plans and the way grant funding can be pursued in an efficient manner - recommend at least two lines of funding application simultaneously in early years
4. Create an Individual Development Plan (IDP) based on these discussions
5. Put CV in SMPH format available on the Office of Faculty Affairs and Development website
6. Meet at least monthly with the primary research mentor
7. Begin to prepare grant applications—apply for a department R&D grant if eligible
8. Attend annual meetings and where possible submit an abstract to the specialty society annual meeting when mature data are available
9. Author multiple manuscripts
10. Explore training programs on campus that match interests and apply to join
11. Consider opportunities to undertake formal classroom/didactic teaching
12. Determine areas appropriate for formal teaching opportunities in the graduate school, medical school or other parts of campus
13. Sign up to give some medical student, resident, and/or graduate/post doc/fellow lectures especially if they are part of formal courses in the medical or graduate school curriculum
14. Attend semi-annual departmental Faculty Development Series workshops

15. Document summary of all teaching activities (use Teaching Summary table)
16. Keep all evaluations of teaching activities
17. Develop an organized system (electronic, paper or combined) with administrative assistant to track and document all academic activities
18. Block time for a calendar review and documentation of activities
19. Update CV monthly or at least every three months
20. Prepare to meet with the POC committee and/or Chair at least once or twice a year and request necessary mentoring
21. Set goals with the POC committee and division director/chair

### **Years 2-3**

1. Review the two areas of scholarship (research, education, service or outreach) and prioritize advancement in those areas over all other activities.
2. Review the IDP
3. Continue regular meetings with the primary research mentor
4. Write an early draft of the personal statement to tell the story of impact and share with the promotions oversight committee/division director/chair
5. Meet with the POC once or twice a year and request necessary mentoring
6. Review and reset goals with the POC committee and division director/chair and consider if an integrated packet or a primary secondary approach is stronger
7. Review upcoming grant submissions and update the IDP based on meeting outcomes
8. Maintain files documenting academic productivity
9. Continue documenting teaching activities; have at least one peer evaluation of teaching completed each year
10. Take on graduate teaching/undergrad teaching/training activities in formal courses
11. Consider reaching out to the Interprofessional Continuing Education Partnership (ICEP) at UWSMPH and join other colleagues to develop multidisciplinary continuing medical education programs
12. Volunteer to provide peer review for one or two journals in your specialty area
13. Present at departmental, regional and national meetings
14. Plan next research studies and how peer review papers will stem from UW research program with majority as first or last author
15. Provide mentorship to trainees (resident, graduate student or post-doctoral trainee/fellows) undertaking those research projects.
16. Make sure to work with trainees to mutual benefit
17. Select committees, other professional/development activities and choose professional society meetings carefully to augment the academic work and reputation rather than distract.
18. Apply for a departmental Faculty Development Grant to obtain a new skill if necessary, for academic work

19. Sign up for one departmental committee (education, clinical operations, research, faculty development, DEI, wellness, others)
20. Learn the art of self-promotion and ensure that colleagues and supervisors know of the work
21. Learn how to gracefully decline requests for academic activities outside the area of academic focus
22. Plan ahead for potential letter writers: Develop relationships with faculty at other institutions, specialty organization or other groups who can write arm's length letters for the tenure dossier (be aware of the conflicts of interest if they become collaborators)
23. Continue to maintain files (electronic, paper or combined) with administrative assistant to track and document all academic activities
24. Block time for a calendar review and documentation of activities
25. Update CV monthly or at least every three months
26. Track summary of productivity on departmental Annual Productivity Summary spreadsheet
27. Ensure that colleagues and supervisors know of your work
28. Write an early draft of the personal statement to tell the story of impact and share with the promotions oversight committee/division director/chair
29. Prepare to meet with the POC committee and/or Chair at least once or twice a year and request necessary mentoring
30. Set goals with the POC committee and division director/chair

#### **Years 4-5**

1. Finalize two areas of scholarship: 1) the basis of promotion with one area of excellence and 2) one area of significant accomplishment (research, educations, service or outreach) OR clearly integrate your scholarship across areas
2. Convert CV to Tenure application format and draft personal statements (copy available in the UW Box Ob-Gyn Mentoring and Promotions document folder)
3. Continue regular meetings with the primary research mentor
4. Continue documenting teaching activities; have a second peer evaluation of teaching completed by same peer to show progressive improvement over time
5. If going up for Excellence in Education, set up outside review of teaching; ad hoc committee report to be included in tenure document
6. Review progress and any feedback (CV, teaching feedback and reviews, summary statements) and reset goals with your POC committee and discuss with division director/chair
7. Update IDP
8. Offer to give Grand Rounds or research seminars at peer institutions (the division director and chair can help with introductions)

9. Submit abstracts to specialty society and/or national research society annual meeting
10. Continue to write multiple peer review papers—should be 1<sup>st</sup> or last author on most and there should be a clear theme emerging that links papers to funding or teaching theme (random unfocused themes of publications are not enough)
11. Make sure work can also be identified as clearly independent; when working in team science collaborations, clearly identify the role, and how work could not be completed without this unique input.
12. Identify exact role in each manuscript as required in your tenure dossier
13. Continue to work as a peer reviewer
14. Identify the impact of area of excellence and significant accomplishment in the biomedical community
15. At regular intervals, continue to finalize personal statements and CV in format required by the divisional committee (biological sciences, social sciences) through which you will submit your promotion packet
16. Finalize list of potential evaluators (including 5 arm's length evaluators)
17. Meet with the POC once or twice a year, and request review of the developing packet by the Committee of Tenured Professors



## Ob-Gyn Promotion Oversight Committee Meeting Procedures for assistant professors on the Tenure track

1

- **Promotion oversight committee meetings are scheduled** by the committee chair with the help of their administrative assistant.
- **At a minimum, the POC must meet each year to review progress to promotion.**
- **At least 2 weeks in advance** of the promotion oversight committee meeting, the **mentee uploads** CV, IDP and other relevant materials to their mentoring and promotions folder (on UW Box). The administrative assistant confirms that the mentee's materials are in the mentee's folder in advance of the meeting.

2

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

3

- The **meeting note taker distributes a draft of the POC summary report** after each meeting to the POC chair, mentee and promotions coordinator for their feedback and approval. Feedback is requested within one week, otherwise notes are considered approved.
- The **POC chair** is responsible for ensuring that within two weeks, the finalized promotion oversight committee meeting minutes are uploaded to the assistant professor'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.

## Clinical Teacher Track Faculty

Clinician Teacher (CT) track faculty spend 90% or more time providing clinical care. CT track faculty are very valuable to our academic medical center given their clinical expertise and participation in medical education. While promotion oversight committees are required for CHS and Tenure track faculty, CT track faculty do not have a POC assigned. The incentives to prepare for promotion on a prescribed timeline differ for CT faculty since the academic appointments are not probationary. CT faculty do have career goals, professional development needs, and aspire to advancing to a higher rank.

Career advancement needs may be met by forms of mentoring beyond the formal structure of promotion oversight committees. For example, there is effective bi-directional mentoring that occurs between colleagues. While peer mentoring is often informal, the implementation of facilitated peer mentoring programs in academic medicine has been met with success.<sup>9</sup> A Facilitated Peer Mentoring Program for the Academic Specialists in Obstetrics and Gynecology (ASOG) division is being piloted in the spring of 2021. Assistant professors meet in small groups during monthly ASOG division meetings with associate professors and discuss mentoring needs around topics such as career planning, how to get the mentoring you need, and assessing what counts for promotion on CT track.

**CT Suggestions by Year (Y 1-5)** (See [CT Promotions Timelines](#) for overview)

### Years 1-3

1. Update CV using the UW SMPH format (at least annually)
2. Create an Individual Development Plan (IDP) and update annually
3. Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office)
4. Sign up for one departmental committee (education, clinical operations, research, faculty development, DEI, wellness, others)
5. Attend semi-annual departmental Faculty Development Series workshops
6. Participate in the ASOG division's mentoring program
7. Consider working on a departmental women's health podcast
8. Consider giving presentations at departmental, local, and community forums
9. Volunteer to give a talk at the Wisconsin ACOG section meeting
10. Consider getting involved with the Wisconsin section of ACOG and/or SASGOG
11. Keep all evaluations of teaching activities including CME events
12. Develop an organized system (electronic, paper or combined) with administrative assistant to track and document all academic activities
13. Apply for a departmental Faculty Development Grant to obtain a new skill
14. Select committees and activities carefully to augment academic interests rather than distract
15. Ensure that colleagues and supervisors know of unique work
16. Seek the clinical and/or academic mentoring necessary to reach career goals

17. Assess appropriate track placement annually for career and promotion goals (track transfer to CHS is allowed in the first three years)
18. Document activities that contribute to promotion readiness, including Clinical/Public Health, Education, Research, and Leadership
19. CT faculty always go up for promotion based on Excellence in clinical practice.

#### **Years 4-6**

1. Review and update IDP (annually)
2. Attend SMPH Pathways to Promotion 102 (offered annually by the SMPH Faculty Development office)
3. Participate in the ASOG division mentoring program
4. Document activities that contribute to promotion readiness, including Clinical/Public Health, Education, Research, and Leadership
5. CT faculty always go up for promotion based on Excellence in clinical practice and can also provide documentation of significant accomplishment in other areas
6. Promotion requires completion of five years in clinical practice
7. Finalize personal statements and CV in SMPH format
8. Finalize list of potential letter writers required for promotion packet

# Best Practices for Promotion Oversight Committee Meetings

## Selection Process

The first step to establishing an effective promotion oversight committee is the selection of the committee members and chair. The members will be faculty with proven investment in supporting scholarly endeavors. The overall goal for the POC is to engage in ongoing efforts to promote success in research, educational excellence and academic stewardship with an eye towards academic advancement/promotion.

## Composition of the Committee

The **division director** forms an individual promotion oversight committee for assistant professors in the division shortly after arrival to the department (within 3-6 months). The division director reviews the Ob-Gyn Individual Development Plan (IDP), seeks input from the assistant professor about potential committee members, and designates a chair for the promotion oversight committee. The division director typically does not serve on the promotion oversight 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 promotion oversight committee.

## Promotion oversight committees

- The committee should consist of three members including the promotion oversight 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 promotion oversight committee has a designated promotion oversight 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 promotion oversight 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 the 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.

### **Initial meeting of the POC**

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 arrival will serve to introduce faculty to the expectations of the new position and facilitate the ability of the promotion oversight committee to help achieve promotion and 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 Mentoring and Promotions Handbook.
- Online resources for Faculty Development, located on the Department extranet, are introduced.
- Introduce Mentoring and Promotions 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 vice chair of faculty development**

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

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

- The POC chair will organize the first meeting (date, time, location).
- The assistant professor will meet 1:1 with the **promotion oversight committee chair** for feedback on their Individual Development Plan in advance of the initial promotion oversight committee meeting.
- The assistant professor will update the curriculum vitae and [IDP](#) and send to the administrative assistant who will share with committee members in advance of the meeting (See Promotion Oversight Committee Meeting Procedures).
- The assistant professor provides background and information about clinical/teaching/research interests, so that the promotion oversight 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.
- **Promotion oversight 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 Mentoring and Promotions 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).

### **Maintaining an Effective Promotion Oversight Committee**

- The division director discusses whether the promotion oversight 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 mentoring needs are being met at this point, and to make changes to the promotion oversight 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 promotion oversight 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 promotion oversight 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 will confirm correct faculty track annually. If track transfer is being considered, the assistant professor will work with division director and promotion oversight 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 3<sup>rd</sup> year of faculty appointment.

## Faculty Mentoring

The early-career faculty will usually have other mentoring relationships external to the POC committee that meet a specific need (e.g. research, education or leadership) not provided by the promotion oversight committee. **Individual mentors can provide the mentee with the following types of guidance:**

- 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.

### Mentee and Mentor Roles and Responsibilities

Once the promotion oversight committee is established, the next step toward establishing an effective promotion oversight 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 promotion oversight committee, will promote effective communication. Equally important is that the assistant professor (mentee) understands the responsibilities and is prepared to communicate regularly with the committee and the division director. The mentee and mentor roles and responsibilities are outlined below.

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



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

#### Assistant Professor (Mentee)

- Work with division director to form promotion oversight 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 promotion oversight 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 promotion oversight committee chair and division director. The Department Promotions Coordinator provides administrative support.
  - The POC chair's medical program assistant (MPA) or administrative assistant schedules the biannual promotion oversight committee meetings.
  - Assistant professors should monitor the 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.

### **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 promotion oversight committee.
- Committee members should review the time commitments of the assistant professor (teaching, research, clinical service, academic service, outreach, leadership, other) and help 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 promotion oversight 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 the mentee's timely progress toward promotion and other career goals.

**Mentee Expectations**

Assistant professors are responsible for keeping track of the [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 promotion oversight committee with documents pertinent to the meeting (see Promotion Oversight 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 promotion oversight 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 promotion oversight 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 Promotion Oversight 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 promotion oversight committee.
- It is strongly recommended that the assistant professor on **tenure track** prepare a draft promotional document and provide it to the promotion oversight 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.

## 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](#) (requires member log in) 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, Education, and Training](#) (GREAT) and [AAMC Council of Faculty and Academic Societies](#) (CFAS).

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## Promotion oversight committee meeting summary for probationary faculty

**Faculty Member Name:**

**Appointment Start Date:**

**Faculty Track:**

**Promotion oversight committee Chair:**

**Promotion oversight 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 3<sup>rd</sup> 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 promotion oversight 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 promotion oversight committee. Updating the IDP for each promotion oversight 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).<sup>10</sup>

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 metrics<sup>11</sup>. A second study<sup>12</sup>, 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.

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

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

### **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.

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



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

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.

- 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](#))

**6. 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)*

**7. 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		

**8. 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):*

#### **9. 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.

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

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\*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](http://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.”

<b>Short-term Goals (next year)</b>	<b>Long-term Goals (next 5 years)</b>
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.

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

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\*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.):

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

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

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

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[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:

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Frequency of meetings/ anticipated duration of the relationship:

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Approximate time investment of Mentor:

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Specific role of Mentor:

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Expectations of Mentee:

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Additional Points:

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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**

	<b>Assistant</b>	<b>Associate</b>	<b>Professor</b>
<b>Onboarding</b>	<p align="center"><b><u>Peer Partner</u> Assigned</b>  <i>Goal: Provide guidance on day-to-day aspects of working in Ob-Gyn Department and at UW</i>  <b>Meet with Promotions Coordinator</b>  <i>Goal: Introduction to Department resources available to support career development and promotion</i>  <b>Meet with Vice Chair of Faculty Development</b>  <i>Goal: Discuss mentoring plan</i>  <b>Complete <u>Ob-Gyn individual development plan document (IDP)</u></b>  <i>Goal: Develop a career plan for faculty appointment in Ob-Gyn Department and at UWSMPH</i></p>		
<b>3-6 months after hire</b>	<ul style="list-style-type: none"> <li>• Work with division director to select POC committee (chair + 2 faculty from within or outside department, based on your needs)</li> <li>• Review letter of appointment and promotional guidelines for CHS track</li> <li>• POC chair administrative assistant/MPA schedules first POC committee meeting</li> <li>• Prepare for mentor meetings               <ul style="list-style-type: none"> <li>✓ Review best practices for mentees</li> <li>✓ Review best practices for mentors</li> <li>✓ Consider areas of excellence and significant accomplishment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Prepare appointment dossier for the SMPH CHS promotions committee</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare appointment dossier for the SMPH CHS promotions committee</li> </ul>
<b>Annually</b>	<ul style="list-style-type: none"> <li>• Faculty Annual Performance Review by division director or department chair; includes annual peer reviews (2) (see Faculty Annual Performance Review Process for details on materials and responsibilities)</li> <li>• Document all teaching (classroom, clinical and OR with medical students and residents, community outreach, etc.) using Teaching Experience example table (sample template: <a href="#">SMPH Teaching documentations for promotion</a>)</li> <li>• Work with your administrative assistant/MPA to update academic activities monthly in the SAM system</li> <li>• Update CV at least annually; see <a href="#">SMPH guidelines for CV format</a> using CHS Track criteria</li> <li>• Review success of POC committee to meet mentee’s career development needs.</li> </ul>		
<b>Ongoing</b>	<p><b>Document activities that contribute to promotion readiness and to post-promotion reviews:</b></p> <ul style="list-style-type: none"> <li>• Clinical/Public Health, Education, Research, and Leadership -see <a href="#">guidelines for CHS promotion</a></li> </ul>		



	<ul style="list-style-type: none"> <li>keep updated CV, IDP, documents to share with POC committee in “Ob-Gyn Mentoring and Promotions” Folder (UW Box); File notes from meetings with mentors and mentoring committee in Box (see Promotion Oversight Committee Meeting Procedures for details)</li> </ul> <p>Keep folders of activities by category to refer back to when preparing for promotion and for reviews</p>		
<b>Within first 2 years</b>	Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office)		
<b>Mentoring</b>	<p><b>Quarterly:</b> Recommend meeting with POC committee chair quarterly in year 1</p> <p><b>Semi- annually for first three years:</b> Meet with POC committee and/or POC committee chair</p> <p><b>Annually from year 3:</b> Meet at least annually with POC committee</p> <ul style="list-style-type: none"> <li>✓ Review and update IDP &amp; CV</li> <li>✓ Develop draft of personal statement</li> <li>✓ Review mentoring needs</li> </ul> <p>Work with committee to prepare for and determine point of readiness for promotion.</p>		
<b>Preparation for Promotion</b>  <b>Years 4-5</b>	<p><b>Review promotion readiness</b> with POC committee and division director and/or department chair as needed.</p> <p><b>Prepare promotion packet</b> with administrative staff support.</p> <ul style="list-style-type: none"> <li>✓ Present updated draft of personal statement</li> </ul> <p>Attend SMPH Pathways to Promotion 102 (offered annually by the SMPH Faculty Development office)</p>	<p><b>Promotion review</b> – process set up at time of annual review for selected year – may elect to participate ONLY in Annual Review Process</p> <p><b>Review promotion readiness</b> with mentoring committee chair and/or division director</p> <p><b>Prepare promotion packet</b> with support of administrative staff</p>	<p><b>5 years after Promotion</b></p> <p>Post-promotion review – process set up at time of annual review for selected year</p>
<b>Promotion Documents</b>	<ul style="list-style-type: none"> <li>UW SMPH Intranet: <a href="#">See Faculty Appointment and Promotion documents for CHS Track</a></li> </ul>		

**TENURE Track Timeline**

	<b>Assistant</b>	<b>Associate</b>	<b>Professor</b>
<b>Onboarding</b>	<p align="center"><b><u>Peer Partner</u> Assigned</b></p> <p align="center"><i>Goal: Provide guidance on day-to-day aspects of working in Ob-Gyn Department and at UWSMPH</i></p> <p align="center"><b>Meet with Promotions Coordinator</b></p> <p align="center"><i>Goal: Introduction to Department resources available to support career development and promotion</i></p> <p align="center"><b>Meet with Vice Chair of Faculty Development</b></p> <p align="center"><i>Goal: Discuss mentoring plan</i></p> <p align="center"><b>Complete <u>Ob-Gyn individual development plan document (IDP)</u></b></p> <p align="center"><i>Goal: Develop a career plan for faculty appointment in Ob-Gyn Department and at UWSMPH</i></p>		
<b>3-6 months after hire</b>	<ul style="list-style-type: none"> <li>• Work with division director to select departmental POC committee (chair + at least 2 faculty from within or outside department, based on your needs)</li> <li>• Review letter of appointment and promotional guidelines for tenure track</li> <li>• POC chair administrative assistant schedules first promotion oversight committee meeting</li> <li>• Prepare for promotion oversight committee meetings                             <ul style="list-style-type: none"> <li>✓ Review best practices for mentees</li> <li>✓ Review best practices for mentors</li> <li>✓ Consider areas of excellence and significant accomplishment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Prepare tenure appointment dossier for the biological sciences divisional committee</li> </ul>	<ul style="list-style-type: none"> <li>• Prepare tenure appointment dossier for the biological sciences divisional committee</li> </ul>
<b>Annually</b>	<ul style="list-style-type: none"> <li>• Faculty Annual Performance Review by division director or department chair; includes annual peer reviews (2) (see Faculty Annual Performance Review Process for details on materials and responsibilities)</li> <li>• Document all teaching (classroom, clinical and OR with medical students and residents, community outreach, etc.) using Teaching Experience table (<a href="#">SMPH Teaching documentations for promotion</a>)</li> <li>• 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 (see Ob-Gyn Peer Review of Teaching guideline)</li> <li>• Physician faculty work with administrative assistant to update academic activities monthly in the SAM system</li> <li>• Review success of POC committee to meet mentee’s career development needs.</li> <li>• Update CV at least annually; see <a href="#">SMPH guidelines for Promotion on the Tenure Track</a></li> </ul>		

	<ul style="list-style-type: none"> <li>• “Progress to promotion” review by Executive Committee at May meeting</li> <li>• Chair or faculty may request advisory review of readiness for promotion by Committee of Tenured Professors</li> </ul>	
<b>Ongoing</b>	<p><b>Document activities that contribute to promotion readiness, including:</b></p> <ul style="list-style-type: none"> <li>• Research, Teaching, Service and Leadership – see <a href="#">Guidelines for Tenure</a> –</li> <li>• Each faculty with a <b>promotion oversight committee</b> will have a folder within the “Ob-Gyn Mentoring” Folder (in UW BOX, where key materials and ongoing CV updates may be filed.</li> <li>• File notes from meetings with mentors and promotion oversight committee (see promotion oversight committee meeting procedures for details)</li> </ul>	
<b>Mentoring: During first 3 years</b>	<p><i>Every 1-2 months:</i> Recommend meeting with research mentors – lay strong foundation for research and timely submission of publications and grants</p> <p><i>Every 6-12 months:</i> Meet with promotion oversight committee or POC chair, and/or with program mentors if supported by a NIH Training Grant or Career Development Award</p> <p><i>Annually:</i> Meet at least annually with promotion oversight committee (POC Chair schedules meetings)</p> <ul style="list-style-type: none"> <li>✓ Review IDP and mentoring needs</li> <li>✓ Draft of personal statement</li> <li>✓ Evaluate progress and goals in areas of excellence and significant achievement</li> </ul>	
<b>Within first 2 years</b>	Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office) and attend the UW Biological Sciences Division Tenure Workshop	
<b>Mentoring: From year 3 to promotion</b>	<p><i>Annually:</i> Meet at least annually with departmental promotion oversight committee</p> <ul style="list-style-type: none"> <li>✓ Review and update IDP and CV</li> </ul>	

	<ul style="list-style-type: none"> <li>✓ Present updated draft of personal statement</li> <li>✓ Review mentoring needs</li> </ul> <p>Work with committee to prepare for and determine point of readiness for promotion.</p> <p>Attend SMPH Pathways to Promotion 102 for tenure track (offered annually by the SMPH Faculty Development office)</p>		
<b>Preparation for Promotion Years 4-5</b>	<p><i>Review promotion readiness</i> with promotion oversight committee and division director, and as needed the department chair</p> <p><i>Extensive review of progress to promotion</i> by Committee of Tenured Professors</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 promotion oversight committee</p> <p><i>Prepare promotion packet</i> with support of administrative staff</p>	<p><b><i>5 Years after promotion</i></b></p> <p>Post-promotion review – process set up at time of annual review for selected year</p>
<b>Promotion Documents</b>	<p><a href="#">UW SMPH Intranet: See Faculty Appointment and Promotion documents for Tenure Track</a></p>		

CT Track Timeline			
	Assistant	Associate	Professor
<b>Onboarding</b>	<p style="text-align: center;"><b><u>Peer Partner</u> Assigned</b>  <i>Goal: Provide guidance on day-to-day aspects of working in Ob-Gyn Department and UW</i></p> <p style="text-align: center;"><b>Meet with Promotions Coordinator</b>  <i>Goal: Introduction to Department resources available to support career development and promotion</i></p> <p style="text-align: center;"><b>Meet with Vice Chair of Faculty Development</b>  <i>Goal: Discuss mentoring plan</i></p> <p style="text-align: center;"><b>Complete <u>Ob-Gyn individual development plan document (IDP)</u></b>  <i>Goal: Develop a career plan for faculty appointment in Ob-Gyn Department and at UWSMPH</i></p>		
<b>6-12 months after hire</b>	<ul style="list-style-type: none"> <li>• Review letter of appointment and promotional guidelines for CT track</li> <li>• Work with division director to: <ul style="list-style-type: none"> <li>Set professional goals</li> <li>Determine need/desire for mentor(s)</li> </ul> </li> <li>• As appropriate: <ul style="list-style-type: none"> <li>Select mentor(s)</li> </ul> </li> </ul>		
<b>Annually</b>	<ul style="list-style-type: none"> <li>• Faculty Annual Performance Review by division director or department chair; includes annual peer reviews (2) (see Faculty Annual Performance Review Process for details on materials and responsibilities)</li> <li>• Work with your administrative assistant to update academic activities monthly in the SAM system</li> <li>• Update CV annually: see <a href="#">SMPH CV</a> format for CT Track</li> <li>• Update IDP with peer partner, mentor, and/or division director</li> </ul>		
<b>Ongoing</b>	Document activities that contribute to promotion readiness, including: <ul style="list-style-type: none"> <li>• Clinical/Public Health, Education, Research, and Leadership – see <a href="#">guidelines for CT promotion-</a></li> </ul>		
<b>Within first 2 years</b>	Attend SMPH Pathways to Promotion 101 (offered annually by the SMPH Faculty Development office)		
<b>Year 4 – 5</b>	Attend SMPH Pathways to Promotion 102 (offered annually by the SMPH Faculty Development office) Determine if on track for career and promotion goals		

<p><b>Preparation for Promotion</b></p>	<ul style="list-style-type: none"> <li>• <i>Review promotion readiness</i></li> <li>• Determine, with division director and faculty development team</li> <li>• <i>Prepare promotion packet</i> as appropriate with administrative staff support</li> </ul> <p>(Use these same steps for associate to professor promotion)</p>	<p><i>Promotion review</i> – process set up at time of annual review for selected year – may elect to participate ONLY in Annual Review Process</p> <p><i>Review promotion readiness</i> with mentoring committee chair and/or division director</p> <p><i>Prepare promotion packet</i> with support of administrative staff</p>	<p><b>5 years after Promotion</b></p> <p>Post-promotion review – process set up at time of annual review for selected year</p>
<p><b>Promotion Documents</b></p>	<ul style="list-style-type: none"> <li>• UW SMPH Intranet: <a href="#">Faculty Appointment and Promotion documents for CT Track</a></li> </ul>		