

# NORDP

National Organization of  
Research Development Professionals



# **NORDP Mentoring Program**

*An Overview of Onboarding*

*Materials and Webinars*

*Offered to Support Mentees*

*and Mentors*



# Presenters

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Manager, Scientific Development



# NORDP's Commitment to Mentoring

The Mentoring Committee focuses on providing meaningful mentoring expertise to support the professional development of NORDP members

About 10% of NORDP members participate every year in the Mentoring Program

Many members continue their mentoring relationships beyond the formal program

# NORDP Mentoring Committee

## Mission

**Equip Research Development Professionals for success by offering meaningful mentoring expertise, support, and resources.**

## Vision

**As a leading research development organization, NORDP is recognized for a dynamic, sustainable culture of mentorship.**

## Values

**Inclusivity • Commitment • Accountability  
• Reciprocity • Empowerment**



# Mentoring Committee Support

- **Curated resources for success**
- **Serve as facilitators for mentoring pairs**
- **Evaluate resources and processes**
- **Develop Mentoring Circle**
- **Develop Peer Mentor Groups**
- **Share OnBoarding Packet**



# Mentoring

**Mentoring is a relationship between two people for the purposes of developing themselves or their careers in navigating the workplace or a particular field. More often than not, the relationships are mutually beneficial, with both partners learning and benefitting from the relationship. (Making Mentoring Work, Catalyst)**

- **Component in comprehensive development**

# Definition of Mentoring Relationship

**Mentoring is a dynamic, \_\_\_\_\_ relationship in which a Mentor and Mentee agree to a partnership and work \_\_\_\_\_ to achieve mutually defined goals to facilitate a Mentee's professional \_\_\_\_\_ .**



# Definition of Mentoring Relationship

**Mentoring is a dynamic, reciprocal relationship in which a Mentor and Mentee agree to a partnership and work collaboratively to achieve mutually defined goals to facilitate a Mentee's professional growth and success.**

**Zachary & Fischler & Healy**

# The OnBoarding Packet Tools



## **Getting Ready: Initial Conversation**

**A guide for topics to discuss when you prepare for and engage in initial conversations.**



## **Mentee Self-Assessment**

**Designed to assess skills, abilities, strengths and challenges to manage career development; can be used early in the mentoring relationship and as a follow-up to evaluate progress.**



## **My MESHH Network**

**Mentorship Expertise Support and Helping Hands. A tool to help you identify mentors, including senior staff, faculty, peers, friends and family.**



## **Individual Professional Development Plan**

**The NORDP Individual Professional Development Plan (IPDP) is a flexible tool to help identify professional development needs and establish goals and objectives to meet those needs.**

# The OnBoarding Packet

## Set of tools

- **Provide a scaffold for the relationship**
- **Facilitate self-awareness**
- **Identify areas for growth**
- **Identify strengths**
- **Identify a MESHH Network**
- **Construct an Individual Professional Development Plan**

## Value and Impact

- **Return on investment**

# Using the Tools

**Each can be used alone**



**Or, each can be used to guide use of the other tools**



# **The Initial Conversation Guide**

**Getting Ready, Getting Started, Getting Results**

# Three Foundational Steps

**1. Maintain Effective Communication**

**2. Align Expectations**

**3. Address Understanding**

**(Entering Mentoring, National Research Mentoring Network)**



# Distance Mentoring

## Be Prepared

- **Consider Time Zones**
- **Utilize Agendas**
- **Reliable Technology**
- **Exercise Patience**

## Be Clear

- **Understand Barriers  
(Language, Culture, Etc.)**
- **Follow-up**



# The Initial Conversation

- **Get to know each other**
- **Share previous mentoring experiences**
- **Talk about learning & development goals**
- **Determine relationship needs**
- **Share personal assumptions & limitations**
- **Discuss personal & learning styles**
- **Establish a series of meetings**

## Tips for the Mentee

Be curious

What do you want to achieve?

Support the conversation

Remember reciprocity

## Tips for the Mentor

Be open

Be prepared to share

Prompt and ask questions

Plan for the initial conversation

# The Initial Conversation – Getting



## 1. Take time to get to know each other.

- **Share resumes**
- **Find commonality** (there is always one)

## 2. Share mentoring stories

- **Past Mentors**
- **Someone who made an impact**

# The Initial Conversation: Getting

## 3. Begin to explore mentees strengths and challenges

- **Assess your barriers**
- **Where do you thrive?**

## 4. Talk about mentee learning and development needs

- **Discuss career vision**



# The Initial Conversation: Getting



## **5. Determine mentoring relationship expectations**

- **Discuss wants & needs**

## **6. Discuss setting goals ... and tracking progress**

## **7. Work together to define the parameters of the mentor relationship**

- **Think about your boundaries**

# The Initial Conversation:



- **Confidentiality Checklist**
- **Mentoring Partnership Agreement**





# The Initial Conversation:

## Confidentiality Checklist

Instructions: After you and your mentor partner have each completed this checklist individually, come to con about which confidentiality protocols you want to adopt for your relationship.

Which of the following assumptions about confidentiality do you hold?	Yes	No
1. What we discuss stays between us for as long as we are engaged in our mentoring relationship.		
2. We can freely disclose what we talk about in our conversations with other people.		
3. After our mentoring relationship has ended, it is OK to talk about what we discussed or how we related.		
4. If there is a demonstrated need to know, we can appropriately disclose our conversations, impressions, etc.		
5. What we say between us stays there unless you give me specific permission to talk about it with others.		
6. Some issues will be kept confidential while others will not.		

## Sample Mentoring Partnership Agreement

	<b>We have agreed on the following goals and objectives as the focus of this relationship:</b>	<b>Our measure for successful accomplishment of each of these objectives will be:</b>
1.		
2.		
3.		
<b>TO ENSURE THAT OUR RELATIONSHIP IS A MUTUALLY REWARDING AND SATISFYING EXPERIENCE, WE AGREE TO:</b>		
<b>1. Meet Regularly.</b> Our specific schedule of contract is as follows:		
<b>2. Look for multiple opportunities and experiences to enhance the mentee's learning.</b> We have identified the following opportunities for learning (e.g., projects, task forces, client teams, conferences):		
<b>3. Maintain confidentiality of our relationship.</b> Confidentiality for us means...		
<b>4. Honor the ground rules we develop for the relationship.</b> Our ground rules are...		

# Checklist: Set the Stage & Tone

- **Take time to get to know each other**
- **Discuss your personal styles**
- **Utilize any helpful tools**
- **Create learning and development goals**
- **Decide Meeting Schedule**
- **Establish a series of meetings**

Next Steps:

- **Review the OnBoarding Packet for Next Tool**
- **Reach out with Questions**





**Questions?**

# Activity



- Accomplishment Sharing
  - 10 minutes

- Partner up with your neighbor
- Each share recent accomplishments.
- Report back on what was learned



# Self-Assessment Worksheet



# Guide to the Self-Assessment

- **Do you have the capacity to devote time and attention to developing a mentoring relationship?**
- **Are you ready and willing to learn?**
- **Where do you want to be in 3 or 5 years?**
- **What skills, abilities, knowledge do you need to get there?**

## Tips for the Mentee

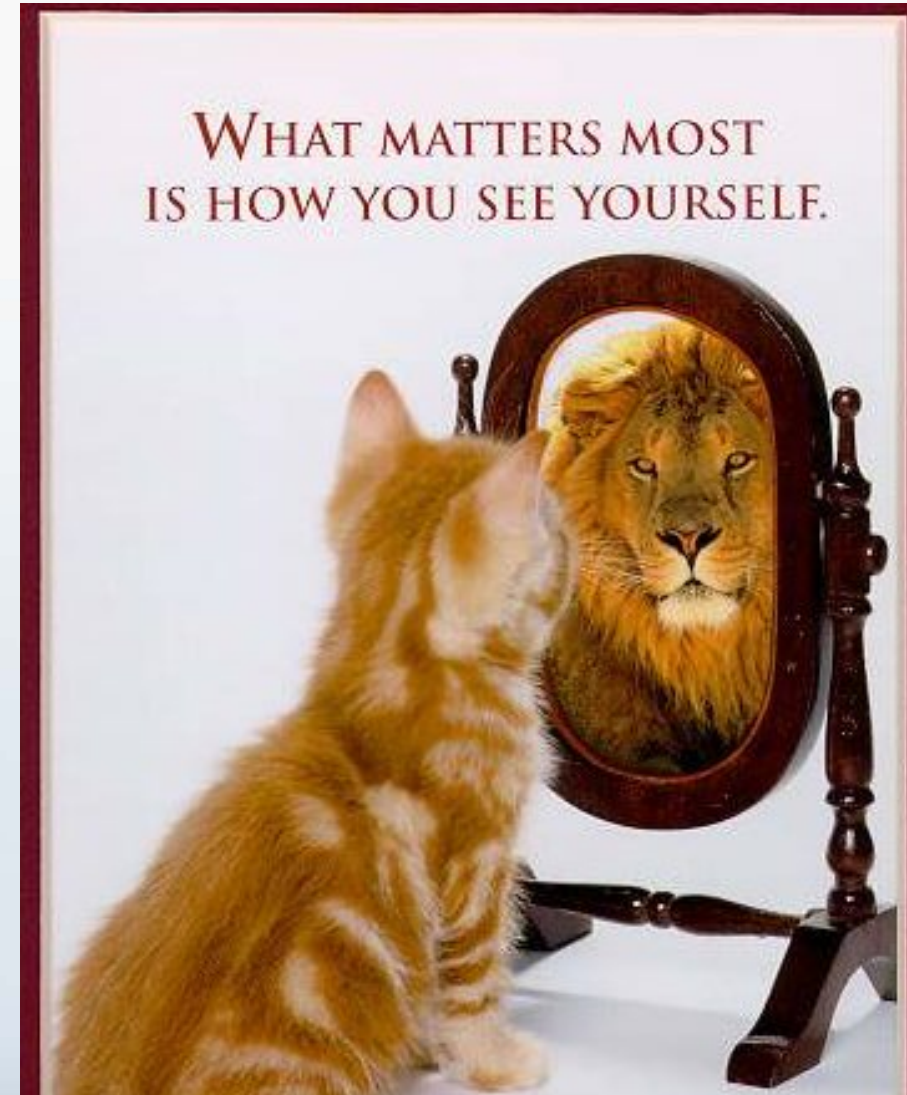
Be reflective and honest  
Request assistance in targeted areas  
Be open to feedback  
Commit to self-directed learning

## Tips for the Mentor

Invite conversation  
Cultivate learning opportunities  
Provide timely and honest feedback  
Reflect and self-assess



# The Process of Self-Evaluation



# The Tool: Self-Assessment Worksheet

- **Measures proficiency and interest**
- **Recognize strengths and prioritizes areas for growth**
  - **Goal - provide direction for the mentoring relationship & identify professional goals for the coming year**
  - **Purpose - assess your skills, abilities, strengths, & challenges in order to manage your career development**
- **Provides direction for those that recognize the need for mentoring, but don't know where to start**

# Overview of Self-Assessment

## Topic Areas:

**Instructions:** For each skill, (1) rate your proficiency on a scale of 1 to 5 (1 = needs improvement to 5 = highly proficient) and (2) Circle “Y” (yes) or “N” (no) to indicate whether you would commit time to developing this skill.

Categories	
<b>Mentoring Relationships</b>	<b>Career Development</b>
<b>Professional</b>	<b>Leadership / Management / Interpersonal</b>
<b>Research Development</b>	<b>Communication</b>
<b>Research Advancement</b>	<b>My Individual Needs</b>
<b>Collaboration</b>	

# Using the Self-Assessment Worksheet

- Compare/contrast answers between mentee and mentor
- Identify areas of strength and target areas for growth
- Consider who in your network might have expertise

Mentoring Relationships									
Identifying and approaching individuals to request mentoring	1	2	3	4	5			Y	N
Negotiating and maintaining a mentoring relationship	1	2	3	4	5			Y	N
Setting and achieving goals and timelines	1	2	3	4	5			Y	N
Receiving and using feedback from others	1	2	3	4	5			Y	N
Other:	1	2	3	4	5			Y	N
Professional									
Creating a professional presentation	1	2	3	4	5			Y	N
Writing	1	2	3	4	5			Y	N
Identifying and using best practices and available resources or tools	1	2	3	4	5			Y	N

# Quotes from Mentees

- **I used it pre-first meeting to augment the conversation guide. It helped me zero in on the precise set of issues most important to me.**
- **Identified areas and then we narrowed to what could be addressed in the program year.**





# Self-Assessment Outcomes



- **A better understanding of skills, abilities, strengths, & challenges**
- **Identify priority areas for the mentoring relationship**
- **Help with setting goals for professional development**
- **Provide a baseline that you can revisit and track progress over time**



# Activity



- Self-Assessment Worksheet

- Take 5 minutes to fill in two sections
- Reflections



**Questions?**

# **MESHH**

## **Network Tool**

**Mentorship Expertise Support Helping Hands**

# MESHH Network Tool

- **A mapping tool that can address your specific needs**
  - **Goal: Develop a personalized network of key individuals that can guide, teach, and advocate for you**
  - **Purpose: Expand your skill set and knowledge through a variety of individuals who are strong in specific areas**

## Tips for the Mentee

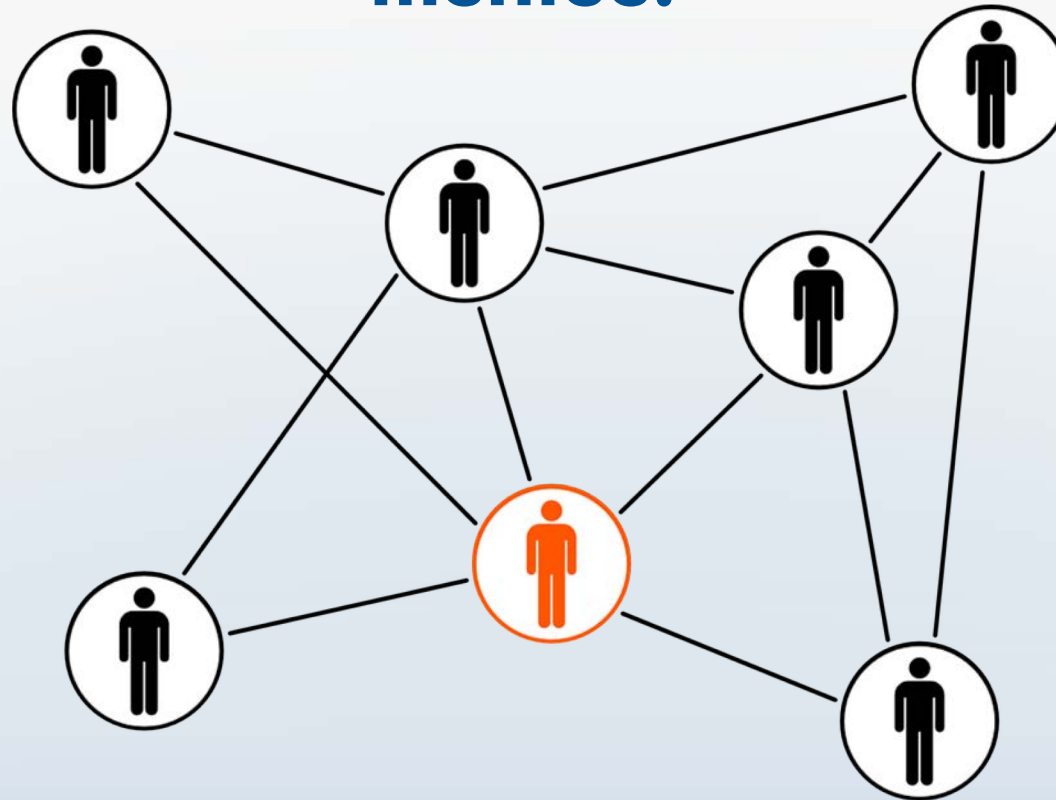
- Where could support be helpful?
- Think about specific people – or a type of person
- Nurture relationship
- Show appreciation

## Tips for the Mentor

- Who in your network could help?
- Ask prompting or guiding questions
- Make introductions
- Develop your network

# Why develop a personalized network?

**“One mentor is almost never adequate for the mentee.”**





Mentee Name: \_\_\_\_\_  
Mentor Name: \_\_\_\_\_  
Date: \_\_\_\_\_

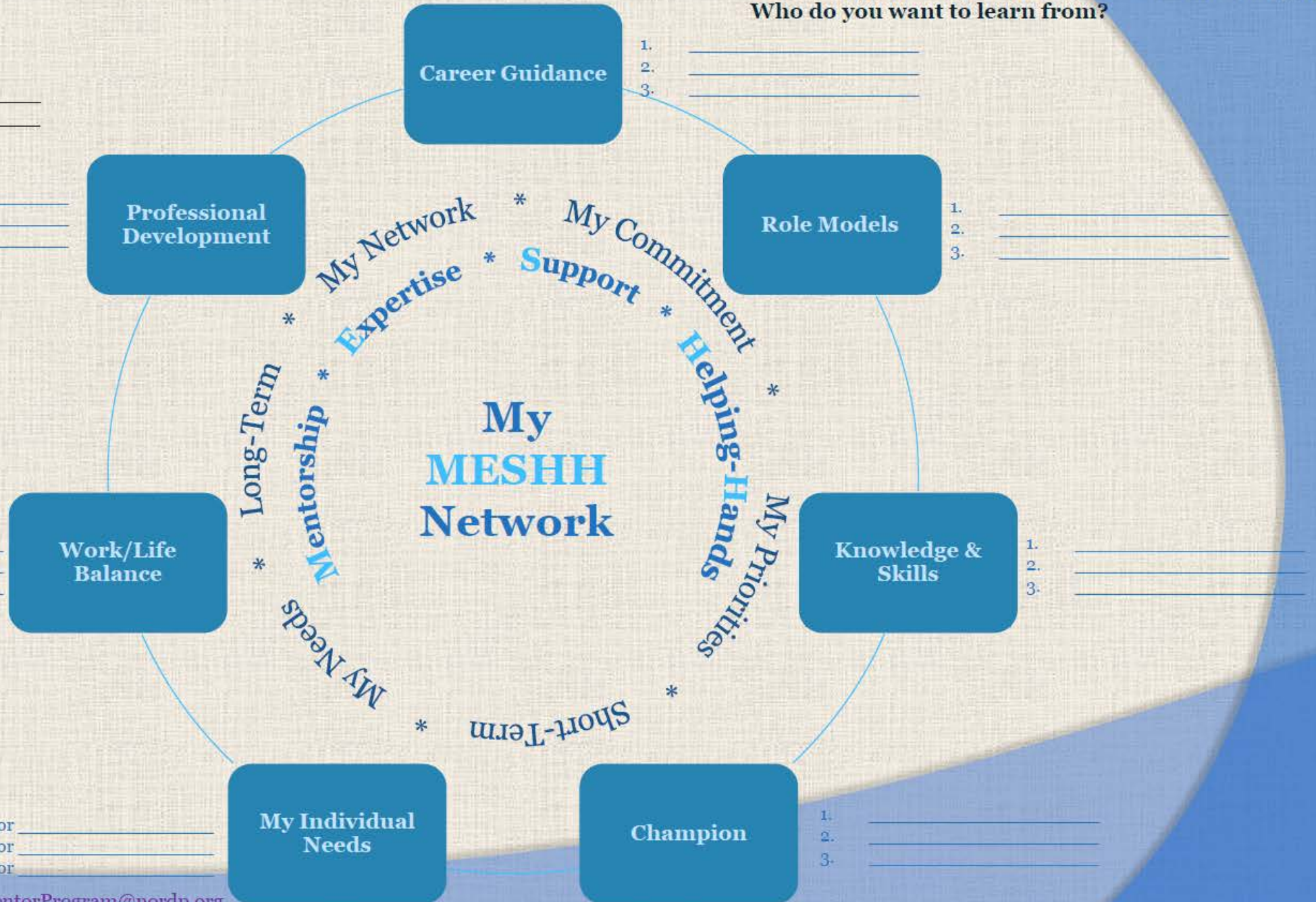
Who can you call upon to be your advocate and guide?  
Who do you want to learn from?

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

1. \_\_\_\_\_ for \_\_\_\_\_  
2. \_\_\_\_\_ for \_\_\_\_\_  
3. \_\_\_\_\_ for \_\_\_\_\_

Questions or Comments: email [MentorProgram@nordp.org](mailto:MentorProgram@nordp.org)



# MESHH Network Tool

## Career Guidance

Senior person in office

Mentor

## Role Models

Community member

More experienced Colleague

## Knowledge & Skills

NORDP Colleague

Anyone with specialized skills

## Champion

Campus Influencers

Supervisor/Boss

## My Individual Needs

Colleague with strong people skills  
Experienced manager

## Work/Life Balance

Friend

Leader

# How others have used the tool

## **What mentors found helpful:**

- **Identifying areas where advice would be helpful**
- **Identifying individuals in each others' contact list to fill knowledge gaps**
- **Focus on what the mentor and mentee are able to address together**

## **What mentees found helpful:**

- **Thinking about ways current NORDP mentor fit in to mentoring network.**



# What you can plan to achieve by using tool

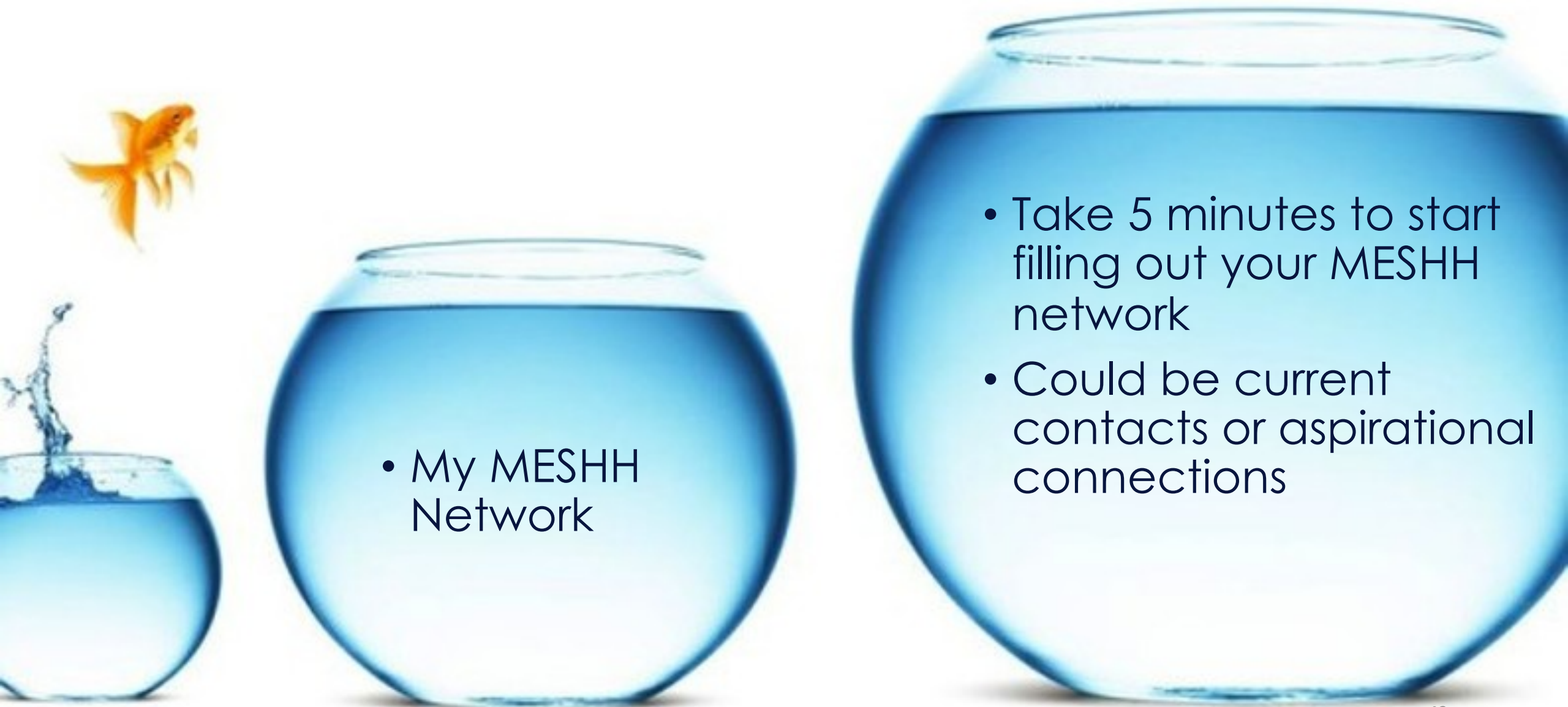
- **Determine specific skills you would like to hone, needs you would like to address**
- **Develop a personalized network of individuals who can provide advice and guidance**
- **Identify individuals who can advocate for you in your career**

# How this tool supports the other tools

- **Builds on the skills assessment**
- **Empowers the mentee to make and achieve specific goals through an Individual Personal Development Plan**
- **Can be revisited as the mentee's goals and needs evolve**



# Activity



- My MESHH Network

- Take 5 minutes to start filling out your MESHH network
- Could be current contacts or aspirational connections



**Questions?**

# **Individual Professional Development Plan**

**Your Roadmap to Success**

# Individual Professional Development Plan (IPDP)

**Roadmap for your professional goals, objectives, and action steps**

**Goal: to understand and help mentee to be focused**

**Purpose: to provide direction/options to address identified mentee needs**

## Tips for the Mentee

- Brainstorm goals
- Be SMART
- Choose a few goals to focus on
- Keep challenging yourself

## Tips for the Mentor

- Draw upon your expertise
- Review and assess goals
- Help the mentee stay accountable
- Facilitate growth and development

# Talking about the IPDP

- **It's not required!** (some mentees don't use it)
- **Make it your own.**
- **Consider integrating it with a larger professional development plan.**
- **It should be a living document-revisit and update it periodically.**
- **Seek help from the Mentoring Committee, if you and your mentor get stuck!**



# NORDP IPDP: How it works

**IPDP serves as a template for the mentor/mentee pair to work from to make it best fit their established goals**

**The worksheet walks you through**

- **Your current professional situation and any anticipated changes**
- **Existing strengths you hold and challenges you face**

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**Individual Professional Development Plan**

The NORDP Individual Professional Development Plan (IPDP) is a flexible tool used to help (1) identify professional development needs and (2) establish goals and objectives to address those needs. It can be used throughout the NORDP Mentoring Program experience and will guide elements of the mentoring relationship.

Mentee Name: \_\_\_\_\_ Mentor Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Current Professional Responsibilities**  
*List your major professional responsibilities and indicate whether you anticipate significant changes to these responsibilities in the coming year.*  
*Example: Coordinating the development of large-scale proposals from idea conceptualization to submission.*

Current Major Professional Responsibilities	Anticipated Changes

**Strengths and Challenges**  
*List two strengths you possess that help you thrive and achieve success. List two challenges that are currently creating barriers to achieving success in specific areas of your work.*

**Strengths**  
*Example: I am a "learner," so I enjoy immersing myself in a variety of different topics over a short timeframe – an essential aspect of my job.*

1	
2	

**Challenges**  
*Example: I am very detail-oriented, which can make it easy to lose sight of the "big picture."*

1	
2	

Questions or Comments: email [MentorProgram@nordp.org](mailto:MentorProgram@nordp.org)



# NORDP IPDP: How it works

**SMART goals you aim to achieve during the mentoring year and objectives to help get you there**

## **Leveraging SMART goals**

- **Specific**  
simple, sensible, significant
- **Measurable**  
meaningful, motivating
- **Achievable**  
agreed, attainable
- **Relevant**  
reasonable, realistic and resourced, results-based
- **Time bound**  
time-based, time limited, time/cost limited, timely, time-sensitive

# NORDP IPDP: SMART Goal

**SMART Goal:** Give a presentation at the 2019 NORDP Conference

## Objective:

- Identify topic for session
- Find Co-presenters

## Activities:

- Talk with others to brainstorm ideas
- Ask mentor and colleagues for suggestions

## Expected Outcomes:

- Addition to your resume
- Build professional relationships and experience

## Mentors:

- Co-workers
- Listserv
- Supervisor
- NORDP peers
- Colleagues at your institution

## Challenges/Barriers:

Lack of time; lack of interest

## How to address them?:

Setup recurring calendar event to work on steps

# NORDP IPDP: How it works

## Timeline and expectations for communication, including preferences for confidentiality and checkpoints for reflection and plan revision

### Communication

Identifying a timeline for communication is critical to effective mentee-mentor relationships. Know who will be responsible for what aspects of meetings. Answer the following questions:

Who will be responsible for scheduling meetings?	
Who will be responsible for setting meeting agendas?	
How often will meetings occur?	
What is the preferred method of communication?	

### Confidentiality

It is important for both the mentor and mentee to feel comfortable sharing information. Identify plans for ensuring confidentiality below (e.g., what may/may not be shared).

Example: I would like everything discussed in my conversations with my mentor to remain confidential.

Mentee	Mentor

### Reflection

You may find that adjustments need to be made to the IPDP over time. Below, identify a date when the IPDP will be reviewed and adjusted (as appropriate).

Example: After the IPDP has been reviewed by both mentee and mentor, we will revisit it quarterly (i.e., every three months).

Plan for Review:			
Date for Review:		Date for Review:	
Date for Review:		Date for Review:	

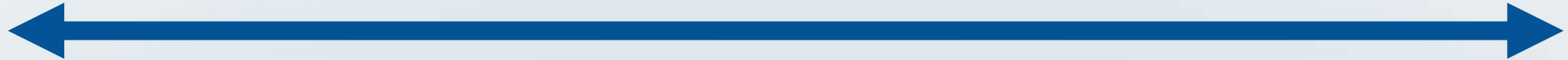
# NORDP IPDP: What you can achieve with it

You will have a defined role for your mentor to assist you in reaching your professional development goals.

You will have a document that outlines strategies for your professional development.

You will have a clear purpose for periodic conversations centered on your goals and objectives.

You will have greater focus and understanding of your competing needs/demands and a way to prioritize them.





**Questions?**

# Wrapping Up

**Feedback, Resources, Looking Forward**



# The OnBoarding Packet Tools



## **Getting Ready: Initial Conversation**

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## **Individual Professional Development Plan**

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# Your Mentoring Toolbox

**Each can be used alone**



**Or, each can be used to guide use of the other tools**



# Feedback on the OnBoarding

**75%** found the overall packet was very useful or useful.

**79%** said the Tip Sheet and Initial Conversation Guide were very helpful or helpful.

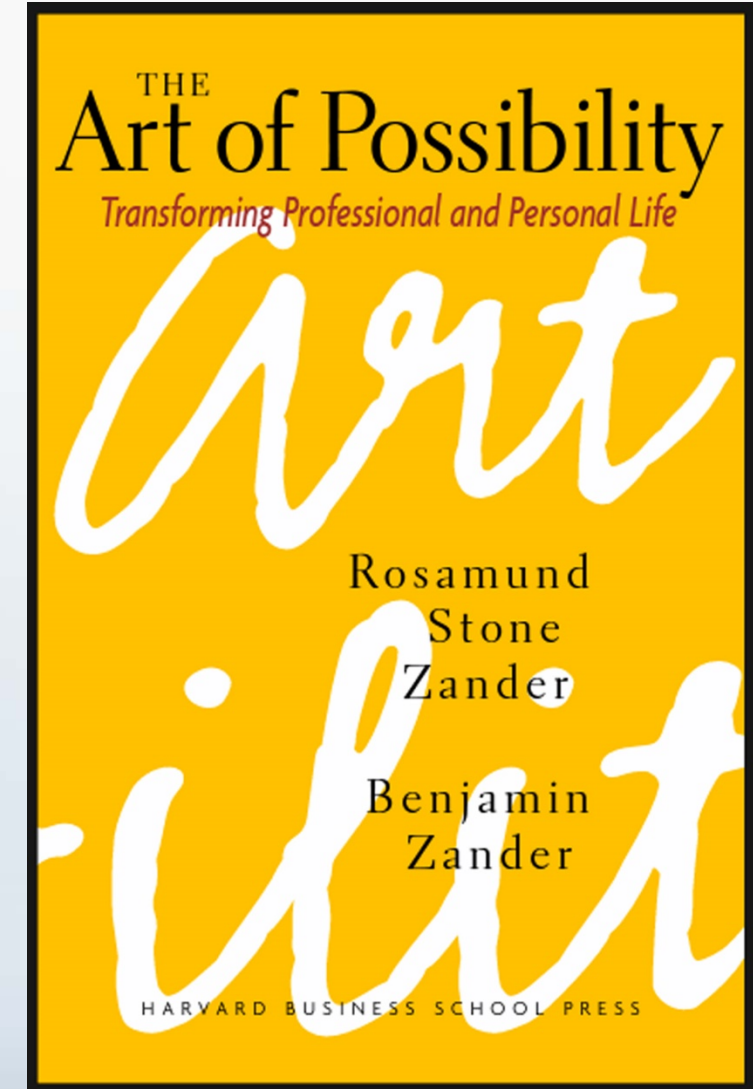
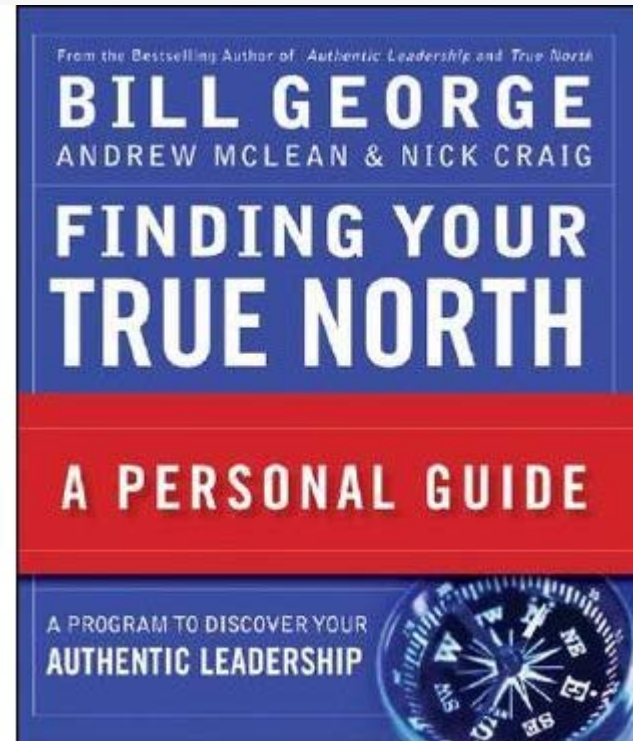
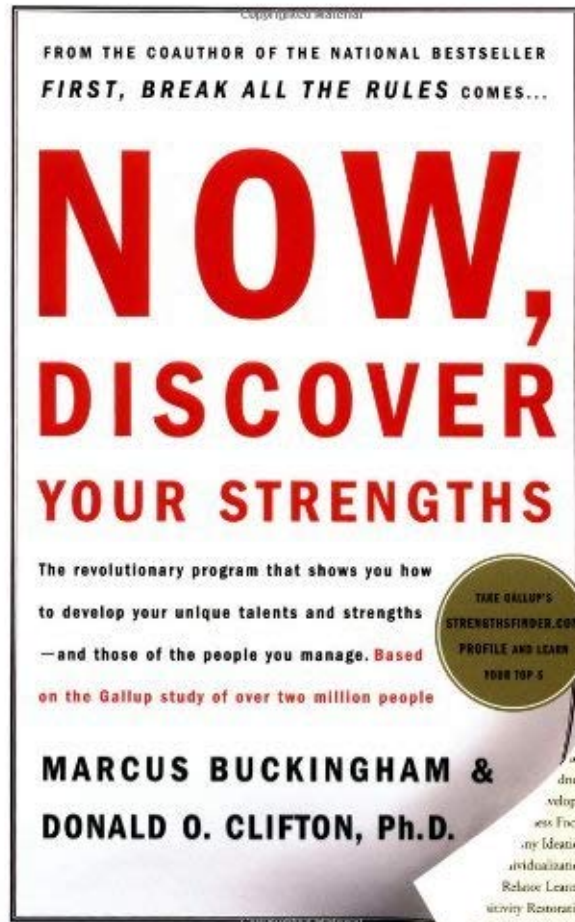
**65%** found the Self-Assessment was very helpful or helpful.

**45%** said the MESHH and IPDP were very helpful or helpful but most simply did not use – of those who used, **81%** found helpful.

**Primary findings/Recommendation:**

**There is a need for a comprehensive orientation with step-by-step explanation of tools in the OnBoarding Packet.**

# Resources: Fabulous Readings



#NORDPMentoringMatters

#PayItForward

#ICARE

# Resources: Mentoring

- **Dinolfo, S., Nugent, J.S. (2010).** *Making Mentoring Work. Catalyst.* New York, NY.
- **Pfund, C., Branchaw, J., Handelsman, J. (2014).** *Entering Mentoring.* W.H. Freeman & Company. New York, NY.
- **Zachary, L. (2005).** *Creating a Mentoring Culture.* Jossey Bass, San Francisco, CA.
- **Zachary, L. & Fischler, L. (2009).** *The Mentee's Guide: Making Mentoring Work for You.* Jossey Bass, San Francisco, CA.
- **Zachary, L. (2012).** *The Mentor's Guide: Facilitating Effective Learning Relationships.* Jossey Bass, San Francisco, CA.



# Resources: Initial Conversations



**Confidentiality Checklist**

**Mentoring Partnership Agreement**

**Smart Goals Worksheet & Checklist**



**#NORDPMentoringMatters**

**#PayItForward**

**#ICARE**



# Resources: Self-Assessment

**The Self-Assessment Worksheet was adapted and modified with the help of several established mentoring programs:**

- **University of California San Francisco**

[http://academicaffairs.ucsf.edu/ccfl/faculty\\_mentoring\\_program.php](http://academicaffairs.ucsf.edu/ccfl/faculty_mentoring_program.php)

- **Indiana University School of Medicine**

<http://faculty.medicine.iu.edu/faculty-development/mentoring/>

- **Berkeley**

<https://hr.berkeley.edu/development/careerdevelopment/self-assessment>

# Resources: IPDP

- **Web-based tool to create Research-specific IDPs, aimed at those with PhD backgrounds:**  
<https://myidp.sciencecareers.org/>
- **The Center for Mentoring Excellence® is the destination for organizations and leaders seeking to achieve better business results through mentoring excellence:**  
<http://www.centerformentoring.com/>
- *Mentor Training for Clinical and Translational Researchers (Pfund, House, Asquith, Spence, Silet, and Sorkness, 2013)*



**Questions?**

**[mentorprogram@nordp.org](mailto:mentorprogram@nordp.org)**