

**Boston Children's Hospital (BCH) Office of Faculty Development's (OFD)
Mentor's Checklist for Clinical Care
(Adapted from BCH OFD 2021-2022 Strategies for Mentors Checklist)**

The Mentor's Checklist for Clinicians

Preparation (if the mentee is not already known to you)

- Introduce yourself by phone, brief letter, or email, but still give the mentee ample opportunity to arrange the first meeting and set forth the agenda.
- Consider sending a copy of your CV or NIH biosketch to your mentee in advance of your first meeting.
- Ask the mentee to send an updated CV and to begin to think about short- and long-term goals.

First and second meetings

- Initiate an introductory discussion of your respective backgrounds and current academic roles.
- Outline what the mentee can expect from a mentoring relationship with you. Suggest that the mentee may wish to speak to prior mentees to set realistic expectations.
- Express interest in the mentee's career at your hospital/lab/department/program. Ask open ended questions such as "what are you looking for in career guidance and mentorship?" Listen to answers with follow-up questions and reflection – "What would you like to see happen as a result of our meeting? How important is that? It sounds to me that the thing you most want to happen is Is that true?"
- Review mentee's CV. Ask "What type of position in academic/clinical medicine/research is your ultimate goal? How long do you think it will take?"
- Make sure that the mentee has had a Career Conference with his/her department head/division or program chief within the past year. Discuss feedback from the Career Conference. Ask about short- and long-term goals, including identifying a timeline for acquisition of skills and completion of tasks, such as a project or manuscript, getting feedback on teaching, joining a professional society, applying for a grant, designing an evaluation for other faculty or trainee clinicians, formulating a QI project, developing educational materials for patients and families, creating an interdepartmental initiative or clinic, writing a review paper, a practice guideline, or blog, etc.
- Ask the mentee to list his/her Developmental Network: colleagues, juniors, mentees, family and friends and Community of Mentors (scholarly/research mentors, career advisors, co-mentors, peer mentors, e-mentors) whom he/she turns to regularly for career advice and support, both inside and outside the mentee's lab/division/department/program/school. (An exercise to help junior faculty map and analyze their Developmental Network is included in Appendix A).
- How well is he/she leveraging social media (blogging, LinkedIn, Twitter, online groups, etc.) to broaden his/her network? At the same time, are there challenges with time management?
- Ask about institutional/departmental resources the mentee needs to achieve goals, and if applicable, to support working from home
- Use a checklist or timeline for tracking of progress.
- Decide together on the frequency of meetings which can vary based on needs of individuals, but occurs as often as several times a week in research labs to once every month or two. Mentoring thrives on informal, continuous guidance. Interactions may range from brief email to a phone "check-in" to lengthy follow up.
- Decide together on the best means of communicating and make sure that responses are timely.
- Ask the mentee to send a short written agenda to you at least a day before your meetings.

Some Topics for Discussion for Mentors of Clinicians

(Note there is no set order for addressing these topics).

Clinical Care

- Discuss clinical expectations and goals for continuous learning. How many sessions or inpatient weeks is the mentee expected to do? Does some clinical time involve teaching or precepting trainees? Are there areas of clinical focus and innovation for scholarship (review articles, case reports, research and collaborations, teaching)?
- Discuss the proposed QI project – what are the aims? Project design and methods? Assessment? Collaborators?
- Assess the mentee’s need for specific skills and how the plan can be actualized over time.
- Review the mentee’s Developmental Network and mentor team. Are other mentors or collaborators needed? For example, are mentors with expertise in QI, health care reform, billing and coding, health equity, informatics, epidemiology, specific medical content or methodology, or statistics needed by the mentee? Is he/she a member of professional clinical organizations? Are there other professional committees/organizations he/she should be joining or taking on more of a leadership role?
- Are there courses at HMS or medical student rotations at Children’s related to clinical expertise? Are there opportunities to be a tutor or give community presentations or Grand Rounds? Are there teaching skills needed for the mentee to achieve national recognition?

Promotion

- Discuss career trajectory and skills/deliverables needed to progress to next level. Is the mentee familiar with the HMS Guidelines for Promotion in his/her specific Area of Excellence?

Balance and Negotiation

- If OK with mentee, ask about and discuss work/life balance including wellness and pandemic stressors/concerns (isolation, financial challenges, illness, and loss). Has this been impacted by increased hours working from home? Are they aware of HMS and BCH work/life and wellness resources?
- Discuss preferred timing of milestones in mentee’s career trajectory and changes desired in the balance of activities and career/academic workload and pace.
- Provide opportunities to learn about negotiation strategies and let the mentee know about the resources of the HMS Ombuds Office and programs at BCH.
- Advise mentee on discussions with supervisor/Division Chief/Program Director and the importance of understanding the Chief’s perspective.

Follow-up Meetings

- Set mutual expectations and responsibilities at the onset of the relationship.
- Meet or make contact in accordance with the agreed-upon plan.
- Use the checklist and timeline to track progress. Be caring and non-judgmental, when giving honest feedback about progress and productivity, not just on successes, but also analyzing failures and how to minimize them in the future. Always ask for the mentee’s reflection on progress.
- Suggest other resources or mentors. Recognize that a Developmental Network needs to adapt in synchrony with career and psychosocial development, by strengthening some existing relationships, relying less on others, and adding new sources of support.
- Try to maintain the relationship for at least one year. Reevaluate the mentoring relationship as needed, but at least annually. Agree on confidentiality and no-fault termination.