



Guidelines



AMERICAN ANIMAL HOSPITAL ASSOCIATION

Mentoring

This toolkit is made possible with generous support from Merck Animal Health

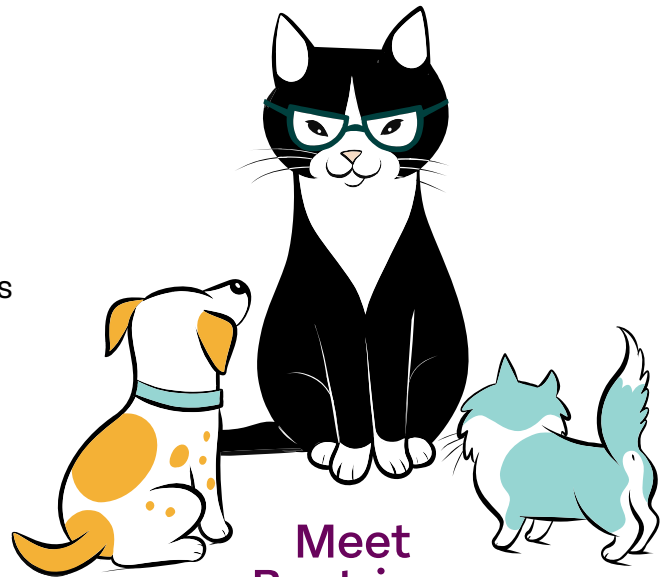


MERCK
Animal Health

TOOLKIT

Contents

- 2 Overview
- 3 Resources for Veterinary Teams
- 4 Introduction and Preparatory Work
- 5 Step 1: Establishing the Relationship
- 10 Step 2: Setting Expectations and Goals
- 13 Step 3: Assessing Progress
- 14 Step 4: Concluding the Relationship
- 16 Step 5: Looking Back, A Retrospective Evaluation of the Relationship
- 18 Spotlight on Wellbeing & Mentorship
- 20 Mentoring and Wellbeing Q&A
- 21 Resource Wish List



Meet Beatrice,
mascot of the 2023 AAHA
Mentoring Guidelines

An infographic titled "2023 AAHA MENTORING GUIDELINES". It features a central illustration of a veterinarian in a white coat holding a yellow cat. To the right, a dog is sitting on a table. The infographic is filled with text boxes, icons, and arrows. Key text includes: "WORRIED ABOUT ATTRACTING VETERINARY PROFESSIONALS WHO WILL JOIN—AND STAY—AT YOUR PRACTICE?", "THE 2023 AAHA MENTORING GUIDELINES OFFER A ROADMAP TO GOOD MENTORING, INCLUDING", "MENTORING BENEFITS VETERINARY PRACTICES BY:", "Decreasing staff turnover and increasing retention", "Reducing burnout and fostering healthy work habits", "Increasing job satisfaction for both mentor and mentee", "What questions mentees should ask when selecting a mentor?", "What mentors should do to prepare to take on a mentee", "How to create healthy mentoring relationships", "Mentorship is particularly important during career transitions, like graduating or starting a new job. But mentoring isn't just for new graduates—professionals at all career stages can benefit!", "SET YOUR PRACTICE APART BY MAKING MENTORSHIP PART OF YOUR CULTURE.", "Early-career veterinary professionals have almost unlimited job options these days, but they still need to learn. They're looking for workplaces that are invested in helping them grow.", "Learn more about how to become a great mentor or mentee", "www.aaaha.org/mentoring", and the AAHA logo. There is also a compass icon at the top and a yellow arrow pointing left at the bottom right.

Resources for Veterinary Teams

aaha.org/mentoring

Read the
Guidelines



Listen to
the podcast



Download
the tools





Introduction and Preparatory Work

The *2023 AAHA Mentoring Guidelines* provide veterinary professionals with a robust introduction to the importance of mentorship in the veterinary profession and an overview of how to successfully establish, engage in, and conclude mentorship relationships. This toolkit is designed to help you implement the guidelines in your mentoring relationships.

Each section of this toolkit is designed to be used in unique ways throughout the mentoring relationship, as outlined below:

Step One: Establishing the Relationship

Before entering into a mentoring relationship, mentors and mentees should get to know each other. Use this section to share information and confirm the partnership will be a good fit for all involved.

Step Two: Setting Expectations and Goals

Successful mentoring relationships are built on shared expectations. This section will help define the parameters and goals of the relationship to maximize outcomes.

Step Three: Assessing Progress

Throughout the mentoring relationship, it is important to assess progress and adjust course as needed to ensure continued progress. Use the forms provided in this step to guide your mentorship meetings throughout the relationship.

Step Four: Concluding the Relationship

When the initial timeline nears its end, take time to reflect on the relationship using the forms in this step.

Step Five: An Evaluation of the Relationship and Plans to Invest in Future Mentoring

A few months after the mentoring relationship has concluded, set up a time to reflect on the relationship and explore what future mentorship looks like for you.

Bonus Content: Resource Wishlist Template

Mentoring does not need to be done in a vacuum and there are numerous external resources available. Mentor and mentee should keep an ever-growing list of resources that can benefit their mentoring relationship and the goals they are working toward.

Before entering a mentoring relationship and utilizing this toolkit, we recommend that you review the [2023 AAHA Mentoring Guidelines](#) and complete a mentoring course such as [AAHA's Mentorship Mastery: Fortifying Veterinary Medicine](#) course.



Step 1:

Establishing the Relationship

Includes Mentor Form, Mentee Form, & Safe Mentoring Relationship Pledge (to be completed by both)

Successful mentoring requires both the mentor and mentee to invest time and energy into a relationship built on trust, respect, and open communication. To facilitate the development of these essential factors, these forms can be used to collect important information about mentor and mentee that can affect the relationship.

Suggested Timeline

Before the first mentor meeting, both mentor and mentee should complete their respective forms and review the Safe Mentoring Relationship Pledge.

During the first meeting, review the information discussed in these forms to ensure that this appears to be a good fit between mentor and mentee. Discuss any concerns you have about the relationship and determine whether the mentoring relationship should move forward.

Mentor Form

Background Information

Name: _____ Pronouns: _____

Educational Background (include undergraduate education, veterinary school, additional degrees and certifications, including and mentorship and DEIB courses completed)

Special Interest Areas (i.e., areas of medicine, communication, hobbies)

Describe your teaching style

Describe your learning style (i.e., book learning, visual learner, audio learner, prefer hands on)

If you would like to share any other information about yourself here, please feel free to use this space

Are there any boundaries that you wish to set for the mentoring relationship?

What is your preferred way to deliver and receive feedback?

Mentor Form, continued



Scan QR code to download this form

Mentoring Details

Why are you investing in this mentoring relationship as a mentor?

Describe your ideal mentoring relationship

What are your goals for this mentoring relationship?

What is your preferred method of communication?

- Face to face Phone Text Email
 Social Media (specify platform):

Do you have limitations on your time that the mentee should be aware of? (i.e., are there particular days, times of day, or chunks of time when you know you will not be available or have consistent limited availability)

- No
 Yes (if yes, please elaborate):

Have you completed any mentor/mentee training?

- No
 Yes

If not, when will you complete this training?

Mentee Form

Background Information

Name: _____ Pronouns: _____

Educational Background (include undergraduate education, veterinary school, additional degrees and certifications, including and mentorship and DEIB courses completed)

Special Interest Areas (i.e., areas of medicine, communication, hobbies)

Describe your learning style (i.e., book learning, visual learner, audio learner, prefer hands on)

What is your preferred way to deliver and receive feedback?

Mentoring Details

Why are you investing in this mentoring relationship as a mentee?

Describe your ideal mentoring relationship

What are your goals for this mentoring relationship? (i.e., is there a specific skill you are looking to learn or professional challenge you are working to navigate)

What is your preferred method of communication?

- Face to face Phone Text Email
 Social Media (specify platform):

Mentee Form, continued



Mentoring Details, continued	
Do you have limitations on your time that your mentor should be aware of? (i.e., are there particular days, times of day, or chunks of time that you know you will not be available or have consistent limited availability)	<input type="checkbox"/> No <input type="checkbox"/> Yes (if yes, please elaborate):
Do you have additional ongoing mentoring relationships? (i.e., other mentors you are working with)	<input type="checkbox"/> No <input type="checkbox"/> Yes (if yes, please elaborate):
Have you completed any mentor/mentee training?	<input type="checkbox"/> No <input type="checkbox"/> Yes
If not, when will you complete this training?	
Are there any boundaries that you wish to set for the mentoring relationship?	

Safe Mentoring Relationship Pledge

(to be completed by mentor and mentee)

I, _____, agree to invest my time in the mentoring relationship with _____ in the role of mentor/mentee. I understand that mentoring requires a safe space and agree to provide this to the best of my abilities. This includes a commitment to create an environment free of discrimination and harassment on all bases, including—but not limited to—race, ethnicity/cultural background, sexual orientation, gender identity, disability, neurodiversity, religion, citizenship/immigration status, and socioeconomic status.

Additionally, I acknowledge that information discussed between mentor and mentee is confidential and will not be disclosed to outside individuals, including employers, family members, and other professionals without the permission of my mentor/mentee. The only exception to this would be in the case of a medical or mental health emergency or a public safety risk. Mentors must disclose if they are mandatory reporters.

Mentor Signature _____ Date _____

Mentee Signature _____ Date _____



Step 2:

Setting Expectations and Goals

Includes Strategic Mentoring Agreement

The Strategic Agreement is used to guide the structure of the mentoring relationship. This document sets desired outcomes and goals that can be used to determine what support is needed during the mentorship as well as determine the logistics of mentoring, such as where and when meetings will occur between mentor and mentee.

This agreement should be created collaboratively between mentor and mentee. If time is limited during mentoring meetings, consider having both parties review and complete the forms prior to the meeting. During the meeting, the agreement can be completed and finalized. This agreement should be periodically reviewed and updated during the mentoring relationship, as outlined in step three.

Suggested Timeline

Complete this agreement during the first 1-2 mentor meetings. This should be completed early in the relationship to ensure that realistic expectations are set.

Strategic Mentoring Agreement

Mentorship Details

Type of Mentorship (check all that apply):

- In-clinic:** Mentor and mentee are employed in the same clinic.
- Local:** Mentor and mentee live in the same geographic area. In-person meetings are possible.
- Distance:** Mentor and mentee live in different geographic areas. Meetings will be virtual.
- Traditional:** Mentor is more experienced individual, and mentee is less experienced.
- Peer:** Mentor and mentee are of equal experience levels.
- Reverse:** Mentor is less experienced individual, and mentee is more experienced.

What is the career stage of the mentee?

- Volunteer
- Trainee
- Early Career
- Mid Career
- Late Career
- Retired

What is the career stage of the mentor?

- Volunteer
- Trainee
- Early Career
- Mid Career
- Late Career
- Retired

Start Date: _____ **End Date:** _____

Note: Mentoring relationships can vary in their length. We recommend establishing an end date for this agreement instead of leaving it open-ended. At this time, the mentoring relationship and agreement may be extended or dissolved (see step 4).



Scan QR code to
download this form

Schedule

Frequency of mentor meetings (i.e., daily, weekly, monthly, quarterly): _____

Length of mentor meetings (this may be a range depending on how frequently you are meeting): _____

Location of mentor meetings (i.e., in clinic, off-site, virtually): _____

Tentative Mentor Meeting Schedule (fill out as far as is comfortable at this time):

Date/Time	Duration	Location	Purpose of Meeting

Mentoring Outcomes

Where does the mentee hope to be at the end of the mentoring relationship?

Consider specific skills that you want to develop, areas of interest you would like to develop, or professional challenges you are currently facing.

Where does the mentor hope to be at the end of the mentoring relationship?

Consider specific skills that you want to develop, areas of interest you would like to develop, or professional challenges you are currently facing.

Mentoring Goals

In this section, take your desired outcomes and create personal and/or professional goals that will help you arrive at this outcome. Goals can be created for both mentee and mentor. If multiple goals are created, be sure it is realistic to pursue the goals simultaneously.

We recommend using the **SMART** goals format to structure your goals. **SMART** goals are:

Specific: The goal has a desired outcome that is well-defined.

Measurable: There is a way to measure progress toward the goal as well as determined if/when the desired results were achieved.

Achievable: It is reasonable to expect the goal could be completed in the allotted time. The mentor/mentee have the resources needed to complete the goal.

Relevant: The goal is relevant to the Mentee and/or Mentor's personal and/or professional life.

Time-bound: There is a target date for completion of the goal.

Example: Improve client review ratings to an average of 4-stars by improving client communication skills during appointments in the next six months.

When developing goals, consider what resources or additional training you might need to accomplish the goal. Additionally, for larger goals, consider creating a timeline composed of smaller goals to assess progress along the way. Review and evaluate progress toward goals at each mentor meeting (more in step 3).

Goal 1:	
Timeline:	
Resources Needed:	
Potential Obstacles:	
Goal 2:	
Timeline:	
Resources Needed:	
Potential Obstacles:	
Goal 3:	
Timeline:	
Resources Needed:	
Potential Obstacles:	

Step 3:

Assessing Progress

Includes progress evaluation questions and suggested meeting agenda.

Throughout the mentoring relationship, mentor and mentee should evaluate the status of the relationship and progress toward goals. Additionally, a periodic review of the strategic agreement should be conducted. Adjustments to the relationship, agreement, and/or goals can be made at any time.

Suggested timeline: Use this form during mentor meetings. Both mentor and mentee should review some questions prior to their meetings then use a standard agenda during their meetings.

Prior to each mentor meeting, both mentor and mentee should reflect on the following questions:

For each goal:

- What progress has been made?
- What is going well while working toward this goal? What could be even better?
- What challenges or obstacles are you currently facing?
- Are you on track to achieve the goal as planned? If not, what do you need to do?
- Do you want to keep working toward this goal?
- Have any stressors come up in the mentoring relationship around this goal?
- Is there anything in the goal setting that could be refined?

Mentoring Relationship:

- What is going well in your relationship with the mentor/mentee?
- What additional support do you need from your mentor/mentee?
- Are there any concerns you have with the mentoring relationship?

Strategic Agreement:

- Is there a need to adjust the mentorship timeline or agreement details?

What resources or support do you need to continue progress toward your goals? Add them to your resource wish list. (i.e., a specific type of support from current mentor, an additional mentor with a different expertise, a particular book, article, video)

During the mentor meeting, consider following a set agenda to maximize the time you have together. Here is a sample agenda that you can use and customize to your own mentoring relationship:

1. Share updates on action plan items from the previous meeting.
2. Celebrate successes and progress.
3. Identify challenges to achieving goals and opportunities for continued progress. Discuss what is needed to address them.
4. Assess progress toward goals.
5. Assess mentoring relationship and strategic agreement and adjust as needed.
 - a. If strategic readjustment is needed, can this readjustment include referrals to additional mentors, or can a guest mentor come in for a couple of sessions?
6. Set action plan:
 - a. What needs to be done before the next meeting? (i.e., read a certain book or article, make an introduction to a colleague, send a check-in email in a week)
 - b. What needs to be done on a longer time frame?
7. Confirm next meeting time and location. Discuss the best way to communicate between meetings.

Note: If conflict arises during the meeting, it may be best to table the discussion or take time to process the information shared and have a follow-up meeting within a few days to continue the conversation.

Step 4:

Concluding the Relationship

Includes outcome forms.

As the end of the timeline set out in the strategic agreement nears, it is important to schedule a mentor meeting to discuss progress and assess the relationship. Some mentors and mentees may decide to continue their relationship in a formal or informal capacity and extend their initial agreement. Others may decide that they have accomplished their intended outcomes and do not need to continue a formal relationship. Regardless of what decision you make, reviewing the relationship is important to evaluate progress and help shape future mentoring relationships.

Suggested Timeline

Use this form during the final scheduled mentor meeting to determine next steps. (Mentor and Mentee should retain a copy of this form).

Mentoring Goal Assessment

Review the goals you set in the strategic agreement, for each goal answer the following questions:



Scan QR code to download this form

Was the goal achieved?	
<input type="checkbox"/> Yes	What helped you to achieve the goal?
	Is there a follow-up goal to continue progressing in this area of your professional and/or personal development?
<input type="checkbox"/> No	What challenges did you face?
	Do you want to continue working toward this goal?
	What resources do you need to continue working toward this goal?
	Do you need to update the goal or timeline? <input type="checkbox"/> Yes <input type="checkbox"/> No

Mentoring Achievements. Review the desired outcomes for mentor and mentee that were established in the strategic agreement form in step two.

Is the mentee where they hoped to be at this time? *If yes, what went well and what helped you get here. If no, what progress did you make, and what do you need to continue moving toward your desired outcome.*

What skills did the mentee display that made them an effective mentee? This is a good place to discuss successes of the mentoring relationship.

Are there particular skills the mentee could work to improve that would make them an even more effective mentee in the future?

Is the mentor where they hoped to be at this time? *If yes, what went well and what helped you get here. If no, what progress did you make, and what do you need to continue moving toward your desired outcome.*

What skills did the mentor display that made them an effective mentor?

Are there particular skills the mentor could work to improve that would make them an even more effective mentor in the future?

Next Steps

What are new goals for the mentee/mentor to work on? *Remember to use the SMART goals format. These goals can be intended for a future mentoring relationship or individual work.*

Will the formal mentorship period conclude at this time or continue?

Conclude Continue

- ▶ If the mentorship is continuing, start at step 2 to create a new agreement and goals for the extension.
- ▶ If the relationship is concluding, schedule time to complete step 5 in 3 to 6 months. Consider if a less formalized mentoring relationship will continue or if a different mentoring relationship is needed at this time.

Step 5:


Looking Back, A Retrospective Evaluation of the Relationship

Includes investment form.

To get the most from your mentoring relationship and improve future mentorships, feedback is essential. These forms give the mentor and mentee an opportunity to reflect on their mentoring relationship and consider how they can continue to support each other in the future.

Suggested Timeline: Complete this form 3-6 months after concluding the mentoring relationship and schedule a follow-up meeting to review if possible. The focus of this meeting is not just follow-up but also to encourage investment in future mentoring.

Mentor Form

Since the mentoring relationship, how did you see the mentee grow?	 <p>Scan QR code to download this form</p>
If you could repeat this mentoring relationship, what would you do differently?	
Do you think your mentee is ready to move into the role of mentor?	
What can you do to continue to support your mentee in the future, even outside of a formal mentoring relationship?	
If your mentee is continuing to seek mentorship in certain areas of their professional life, are there other individuals from your own network who might help them continue to progress? (i.e., in a special interest area of medicine, pursuing practice ownership, or making a career transition)	

Mentee Form



Scan QR code to
download this form

What did you learn during your mentoring relationship that you could take into a future mentorship?

If you could repeat this mentoring relationship, what would you do differently?

Is there someone in your professional life who you feel you could support in the role of a mentor? Do you have an interest in moving into this role?

If you are wanting to move into a mentoring role in the future, what skills do you need to develop to succeed in this role?

What big goals do you have for your career? Is there something your mentor could do to help you achieve them?

How will you invest in mentorship in veterinary medicine?

Are there new connections you could make that would benefit you in achieving your goals? If so, with whom, and how will you pursue those connections?

Spotlight on Wellbeing & Mentorship

Insights from the 2023 Merck Veterinary Wellbeing Studies^{1,2} show how mentoring can support wellbeing for all team members and where there is still need for improvement.



Positive predictors of wellbeing that can be supported by mentoring:

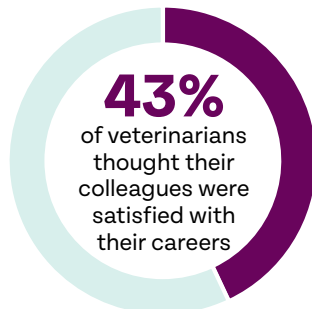
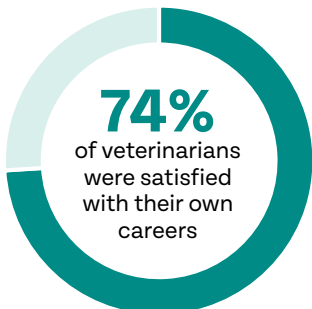
- ✓ Healthy clinic culture
- ✓ High job satisfaction
- ✓ Opportunities for promotion
- ✓ Strategies to cope with stress
- ✓ Work-life balance

The state of wellbeing among veterinarians:

Reality is better than the overall perception



Veterinarians reported higher job satisfaction than the general adult US population



Less than **2.5% of veterinarians under the age of 55** indicated they were very likely to **leave the field** entirely in the next **2 years**

How can we nurture and retain more veterinary professionals in their chosen field?



Prioritize stress management for mentor and mentee



Create a supportive work environment



Provide mental health coverage and employee assistance programs (EAP)



Have the difficult conversations about finances and how they affect individuals, practices, and pet owners



Provide living wages for all team members

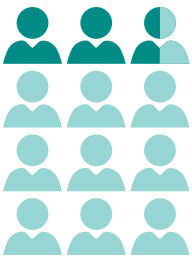


Create opportunities for career advancement for more staff members

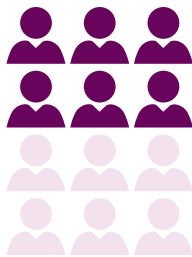
The state of wellbeing among veterinary staff:

Finances are a major concern

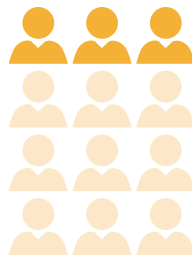
Clinic staff (apart from practice managers) reported lower overall job satisfaction rates than the general US adult population



20%
of clinic staff
reported experiencing serious psychological distress



50%
of staff
reported feeling dissatisfied with their income



25%
of clinic staff
reported needing to work a second job to make ends meet

The state of wellbeing among younger, less experienced veterinarians:

Mentoring can make a huge difference here



Job satisfaction and wellbeing in veterinarians were reported to be lowest in younger, less experienced veterinarians



Serious psychological distress was highest in veterinarians aged 34 and younger (17%)



Veterinarian wellbeing was inversely proportional to their degree of student debt

1. Merck Animal Health Veterinary Team Wellbeing Study II. 2023. www.merck-animal-health-usa.com/offload-downloads/2023-vet-team-wellbeing-presentation
 2. Merck Animal Health Veterinary Wellbeing Study IV. 2023. www.merck-animal-health-usa.com/offload-downloads/2023-vet-wellbeing-presentation

Mentoring and Wellbeing Q&A

The AAHA Mentoring Guidelines compile expert information on the key elements of mentoring programs and how they benefit both the mentor and the mentee as well as the practice as a whole. One important area where mentoring can make a huge difference is in the mental health and wellbeing of early career veterinary professionals.

To learn more, we spoke with Addie Reinhardt, DVM, MS, Founder and CEO of MentorVet, and Taylor Tillery, DVM, Veterinary Academic and Industry Liaison Lead for Merck Animal Health. They explained how mentorship can help protect the mental health and wellbeing of veterinary professionals and shared some insights from the 2023 Merck Veterinary Wellbeing Studies.

Q: How can a lack of mentorship negatively affect wellbeing in early career veterinary professionals?

A: While it won't be the same for everyone, lack of mentorship in early career veterinary professionals can contribute to:

- Lack of confidence in medical and surgical skills
- Feeling underqualified to make decisions and treat patients
- Being scared of making a mistake
- Moral distress associated with a fear that they are not adequately serving their clients and patients
- Stunted development particularly in surgical skills, as it's hard to grow without support and encouragement
- Decreased job satisfaction

Q: How common is it for mentors to express that they need more training to become a good mentor?

A: This is very common among mid-career veterinarians. Here are some of the reasons why:

- Mentors recognize the generational differences between themselves and their mentees. They want to understand how to better support their younger colleagues.
- Many early-career veterinarians have had more access to communications and wellness training during vet school than mid-career vets had. These mid-career vets want to level up on this training.
- Because our industry has a strong need to recruit and retain good people in practices, would-be mentors want more formalized training and structure so that they can help their mentees develop more confidence and feel supported in their careers.

The onus lies on all of us to support one another.

Q: Where is there a need for continued improvement in mentoring offerings or processes?

A: Here are some opportunities for improvement:

- There are other populations besides early-career veterinarians that need more support, including technicians, assistants, mid- and late-career veterinarians, CSRs, kennel technicians, and practice managers. Finding ways to support these other members of the team so that they can gain confidence and fulfillment in their careers is important.
- The onus lies on all of us to support one another. Some of it can come from external organizations like MentorVet, but some of it must come from within the workplace.
- It will continue to be important for both individuals and workplaces to find ways to reduce stress for all members of the team.

Q: What should a good mentorship program look like?

A: This will vary a lot depending on the needs of the mentee and the mentoring resources available. This may include:

- One-on-one mentorship from another veterinary professional working in the same practice
- A mentor who is hired solely to support multiple veterinary professionals, often at multiple different locations
- Programs like MentorVet and MentorVet Tech that match mentees with volunteer remote mentors and provide support through peer mentorship and professional development
- Mentoring by non-veterinary professionals in areas such as business, finance, law, communication, and other areas of interest
- Providing opportunities for veterinary professionals to grow and learn new skills throughout their careers

Additional Resources

Mentoring supports continual learning, professional and personal development for both mentors and mentees. In order to accomplish this, it is important to have resources to support this development. We encourage mentor and mentee to keep an ongoing list of resources that would help in achieving goals or improving the mentoring relationship. This may include articles, books, podcast episodes, videos, webinars, or training/certificate programs in a specific area.

Here are a few ideas to get you started:

AAHA Mentoring Guidelines

www.aaha.org/aaha-guidelines/2023-aaha-mentoring-guidelines/home

AAHA Learning/CE courses

www.aaha.org/education/all-veterinary-professionals/aaha-learning

MentorVet

www.mentorvet.net

Pawsibilities Vet Med Learning Center

pawsibilitiesvetmed.com/learn/new_user

Not One More Vet Student Support and Mentorship Committee

www.nomv.org/students

Pride VMC

pridevmc.org

BlendVET

www.blend.vet

Multicultural Veterinary Medical Association

mcvma.org

Dr. Kate Boatright's mentoring resources and the Veterinary Mentorship Manual

writetheboat.com/mentorship





This toolkit is made possible with generous support from Merck Animal Health



©American Animal Hospital Association. aaha.org