

TABLE 6.1 Action Steps for the Mentoring Relationship

Engage in Self-Reflection and Determine Readiness
<ul style="list-style-type: none">• What are my strengths and areas for improvement?• What kind of mentoring relationship do I want and need? (See Section 1 for models and delivery methods.)• Do I have any “deal breakers” when it comes to choosing a mentor/mentee, mentorship model, or delivery method?• What skills, experience, or identities are important that my mentor/mentee offers?• Where do I have more learning to do before I can offer mentorship to someone whose lived experience or social identities are different from mine? How can I obtain that learning without burdening the mentee?• What questions will assist me in assessing my mentor’s readiness to help me navigate issues I may encounter related to my lived experience or social identities?• Am I ready for the role, responsibilities, and expectations required of a mentor/mentee? (See Section 4 for details.)
Research Mentorship Programs and Potential Mentors
<ul style="list-style-type: none">• Research existing programs.• Consider existing relationships and networks.• Learn about your potential mentor/mentee by doing research to find out more about them or meeting with them for an introduction.
Initiate or Decline a Mentoring Relationship
Initiating:
<ul style="list-style-type: none">• Ask in person, write an email, or invite them to chat over coffee. Share your interests and needs, keeping in mind potential time demands on you both. Ask the mentor/mentee about their interest in entering a mentoring relationship with you.• Be prepared for rejection and do not take it personally.
Accepting or declining:
<ul style="list-style-type: none">• Assess why you are being asked.• Be honest about your interest, capacity, or time and share feedback about your decision, if necessary.• Be mindful of the potential negative impact of a poor mentoring relationship or power dynamics.
Initiate a Mentoring Relationship by Mutual Agreement
Before your first meeting:
<ul style="list-style-type: none">• Be prepared. Send an agenda of discussion topics in advance.• Begin to consider goals for the mentoring relationship.• Consider and agree on the conversation setting.
During your first meeting:
<ul style="list-style-type: none">• Refer to Table 6.2 for potential questions to ask during your first meeting.• Discuss roles and responsibilities.• Collaborate to choose the type of mentoring relationship that best fits your situation.• Get acquainted. Build trust and psychological safety by openly sharing and discussing experiences, values, worldviews, and issues.

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TABLE 6.1 Action Steps for the Mentoring Relationship, Continued

- Develop mutual expectations and boundaries. Discuss accountability of both parties at the beginning of the relationship. Discuss communication needs, preferred methods (phone, email, text, etc.), and confidentiality.
- Discuss ethics, including conflict of interest issues, and agree upon ethical boundaries.
- Discuss a vision plan, covering your overall purpose and long-term goals for the relationship.
- Discuss how to acknowledge and celebrate progress and accomplishments.
- Create a time frame for the relationship that works for both parties. Clarify a mutually agreeable end point or time for reassessment of the relationship.
- Determine a schedule for meeting together at regular intervals to discuss progress on goals and evaluate the mentorship relationship. Consider the time demands of each individual. If most meetings happen virtually, also schedule occasional face-to-face meetings, if desired and possible.

Before follow-up meetings:

- Collaborate to choose the type of mentoring relationship that best fits your situation.
- Plan for your discussions, with the mentee taking the lead in planning. Meeting topics include issues of concern, areas of accomplishments, progression toward goals, and new challenges. You may also plan to discuss specific cases or situations that have cropped up since the last meeting.

During follow-up meetings:

- Establish, clarify, and write down goals to achieve the vision.
- Define and prioritize areas of greatest needs, with the mentee taking the lead rather than relying upon the mentor to define needs for them.
- Use SMART goals for the mentor and mentee, making sure to personalize goals to fit the needs of the mentee.¹
- Examine the mentee's concerns and fears when establishing goals (Refer to Table 6.4).
- Be accountable. Follow up on points of discussion, share resources, and make personal/professional connections. Be mindful of overpromising, which can set back the mentee's goals or damage trust.
- Create a process whereby a mentee can ask for immediate help as needed. This might include a back-up mentor or providing a list of resources to your mentee.
- Establish a protocol to help the mentee develop new skill sets and proficiency in areas of interest.
- Discuss expected outcomes and how those will be monitored or measured. Set up relevant mileposts/landmarks for goals and an evaluation process (including the time, place, and procedure) to evaluate the mentee's progress toward goals.
- Discuss how both parties will offer new ideas and feedback to each other. Use a separate mentor-mentee evaluation form. Do not confuse it with a performance review.
- Discuss how to resolve conflict. Conflict naturally occurs because of differences in background or differences in approaches. Conflict may arise when the agreement is not specific or written down. Resolution of conflict should occur in private to maintain the self-esteem of both the mentor and mentee.
- Celebrate progress and accomplishments regularly.
- Refer to Table 6.3 for questions to keep the conversation going.

Evaluating the Relationship

- Check in frequently with your mentor/mentee to determine whether mentee goals are being met.
- Schedule a time to re-evaluate and assess how the relationship is going.
- If necessary, revisit expectations, boundaries, accountability, and goals.
- Take notes and document interactions, topics, recommendations, and progress.

Ending the Relationship

- Summarize what goals have been accomplished.
- Thank the other party for whatever you feel has been gained.

¹ Doran G. There's a S. M. A. R. T. way to write management goals and objectives. *Management Review* (AMA Forum) 1981;70:35–6.

The 2023 AAHA Mentoring Guidelines are available at aaha.org/mentoring.

These guidelines were prepared by a Task Force of experts convened by the American Animal Hospital Association (AAHA) and were subjected to a formal peer-review process. This document is intended as a guideline only, not an AAHA standard of care. These guidelines and recommendations should not be construed as dictating an exclusive protocol, course of treatment, or procedure. Variations in practice may be warranted based on the needs of the individual patient, resources, and limitations unique to each individual practice setting. ©2023 AAHA.

