



American College of
Healthcare Executives
for leaders who care[®]

ACHE Mentee Guide

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The appendices are a collection of ACHE articles on mentoring that offer further knowledge, tips and tools to enhance your mentoring relationships.

Disclaimer: For the ease of reading, we will refer to the mentor with feminine pronouns and the mentee with masculine pronouns throughout this guide.

ACHE sincerely thanks Pat Shehorn, senior consultant to ACHE's Career Resource Center, for her contributions to the ACHE Mentor and Mentee Guides.

Chapter 1

Being a Mentee

First Things First: What is Mentoring?

It was Homer's epic tale *The Odyssey* that formally introduced us to the concept of mentoring: Mentor was a friend of Odysseus, who placed Mentor in charge of his son when Odysseus left for the Trojan War. Today, Merriam-Webster defines mentoring as a wise and trusted counselor or teacher; an influential senior sponsor or supporter. This is a good definition, but merely a starting point in the journey of understanding mentoring.

Mentoring is a relationship between two individuals, with the more experienced individual, the mentor, serving as coach, cheerleader, confidant, role model, devil's advocate, counselor and, when possible, a "door opener" for the mentee. It is a relationship based on trust and mutual respect in which both partners, the mentor and the mentee, have responsibilities and should benefit from the relationship.

Mentoring is all about learning and growing. At the professional level, both partners in the relationship are adults, so it is important to consider how we learn as adults. Malcolm S. Knowles, a noted practitioner and theorist of adult education, laid out the basic principles of adult learning in the 1970s. He says that critical to effective adult learning is one's own involvement in diagnosing, planning, implementing and evaluating their learning. In essence, adults like to be self-directed learners. Mentors don't have all the answers. What they do have is experience that may help them help you reflect and learn and grow. So as the mentee, you will be doing a lot of the work.

Some Myths About Mentoring

As a mentee, you are a subordinate.

Understanding what's involved in your role as a mentee—and how it differs from your role as a subordinate—is key to ensuring a meaningful mentoring experience. Your mentor's role as a manager and as a mentor may also seem very similar. In both roles she will serve as a combination of coach, confidant

and sounding board. However, as a mentor, she will need to be prepared to take on a broader, more personal relationship with you than the one she has established with her employees. The same holds true for you as the mentee. You are not the subordinate, but a partner in a personal, trusting, learning relationship. As a mentee, you are not answering to your mentor regarding your performance or whether you completed a project on time and on budget. Your mentor is there to provide you with perspective and questions that encourage learning and challenge you to think in new and creative ways. And unlike the manager/employee relationship, the mentor/mentee relationship extends beyond the typical workday or a traditional workplace role.

Once you have a mentor, they are your mentor for life.

Most professionals have a number of mentors throughout their careers. Remember that mentoring is a relationship based on learning and growing as an individual, and as a professional. Our needs as human beings change over time and with experience. Just as all of our relationships in life change over time, what we need in a mentor also changes over time. While needing/wanting a mentor is something you may repeat often during your lifetime, for the majority of us, any specific mentor/mentee relationship is of relatively short duration. While the length of time depends on you, your mentor and the mutually agreed upon goals that you will be focusing on, best practice suggests that about a year of meeting regularly is necessary in order to develop a relationship based on trust and respect, to work your way together through defining and then achieving the learning objectives of the relationship.

Living close to my mentor is important.

In today's global world, where families and friends are often spread far and wide, we are able to not only maintain close meaningful relationships but also develop new ones. Distance mentoring is not only possible, it can have its benefits. A mentor from another part of the country may bring different

Being A Mentee

perspectives and insights than a mentor who may work in the same organization or city.

Mentoring from a distance does require a bit more thought, planning and focus. You will need to agree upon the primary method of meeting, be it by phone, Skype, FaceTime or some other Internet-based audio/visual tools. See Appendix A for more detailed tips on distance mentoring.

My Role as Mentee

What you gain from a mentoring relationship has much to do with how open you are to learning; how willing you are to invest in developing a relationship of trust that requires time and energy; and how willing and open you are to being challenged, receiving candid feedback and being reflective. The most important thing you bring to the mentoring relationship is your willingness to learn and grow personally and professionally.

The mentee is usually the initiator of the mentor/mentee relationship, unless it is a structured, organizationally-based mentoring program. In either case, the relationship exists mainly for your growth and development, thus you need to take the lead. As such, you should be proactive not only in seeking out a mentor but in approaching the overall mentoring relationship with an agenda and coming to each mentoring conversation prepared with topics for discussion. It is up to you to communicate to your mentor how best you learn, how you communicate, what your objectives are and what your vision/dreams are for the future. The more insights into your learning and communication style and into your vision for the future, the better your mentor can assist you in your growth and development.

How To Be the Best Mentee

If you truly want a successful mentoring experience, you need to **come to the relationship motivated and empowered to plan and direct your own professional life**. It is you, the mentee, who will need to own the responsibility for your development, learning and professional growth.

First, you must be willing to **put in the time to develop an open and trusting relationship**. This will take months and requires your full effort. Without this foundation of trust, a meaningful learning/growth relationship cannot take hold. Trust has a lot to do with being open and honest with your mentor and **following through on your commitments**, so be sure to do what you say you are going to do between meetings.

Your mentor expects that you will **have a clear understanding of why you want to be mentored**. She expects that you understand that the mentoring relationship is **confidential** so that she will feel free to share her personal experiences with you. You should be able to clearly articulate your expectations of your mentor so that there can be a conversation and agreement upon those expectations early in the relationship. See the section on the role of a mentor.

Be prepared for each mentoring session, **have an agenda**, yet **remain flexible** if the conversation takes you in a slightly different direction. Do create goals and milestones and remain focused on achieving what has been agreed upon in the mentoring sessions. You also need to **be a good listener**, **setting aside time for self-reflection**. You should be able to talk with your mentor about your preferred learning style. You must be able to **accept constructive criticism** and have the courage to provide feedback both positive and constructive to your mentor in order to maintain a healthy productive mentoring relationship.

Focus on the relationship, rather than the outcomes. Your mentor's job is not to get you your next job. It is important to be realistic in your expectations. If you build a strong trusting relationship with your mentor, they will help you in more ways than you can imagine.

Being the best mentee is much like "managing up," a common corporate term describing the process by which a subordinate takes ownership of the relationship, letting the boss, or in this case the mentor, know what he needs. This may be done by planning meeting agendas, asking questions, listening, paying attention, maintaining a positive attitude no matter what, keeping your mentor informed, working to understand your mentor's style and leaning into that style to promote better communication, **being sensitive to the mentor's needs**, completing agreed upon tasks, and requesting and giving honest feedback in a caring manner.

Mentee's Tools

In order to best learn and grow, it is important that you know yourself well and understand where you have been and how you grew into the person you are today.

Ask Questions

First, before starting a mentoring relationship ask yourself the following:

- What opportunities can this mentoring experience give me?
- What do I want to take away from this experience?
- What will be different for me as a result of this experience?
- What are my values/what motivates me?
- How do I learn best? By reading? By listening?
- Do I respond best to gentle guidance? Or structured, directed guidance?

As you proceed through the relationship, and as you are the one establishing the agenda for the conversations, make sure you are planning the agendas/conversations so they provide the most value to you. Suggested agendas can be found in the Tools section of Chapters 3, 4, 5 and 6. Be honest, don't be afraid to be direct and ask your mentor questions. Let your mentor know how you feel, what you think would be most helpful to talk about and ask your mentor those direct questions about what you want to know.

Self-Reflection/Personal Journey

Take the time to look back over your life as an adult: Look at those significant life events, both personal and work-related, that influenced you the most. This reflection can help you be a better mentee.

Write down the events, milestones and transitions that have had the most impact on who you are today. Remember that both positive and negative events play an important role regarding who we are, so list both. Then, think about **who** helped you to grow and think through these milestones as they were occurring. Finally, consider what you learned and how your direction or thinking changed as a result of these influential events and people.

Here's an example: Since Pat was a sophomore in high school, she wanted to be a physical therapist. Her dream came to fruition and she got a great job at a large city hospital. She never thought of doing anything more. Then, her boss asked her to take on a leadership role in the local Physical Therapy Association during her second year at the hospital. He told her that he thought she had leadership skills. She agreed and ended up leading the local chapter and being elected to a state office. With this new confidence in her leadership abilities, she decided to attend graduate school. Without her boss believing in her and opening the door to a local leadership role, Pat says she doesn't know if she would have landed her current position: hospital CEO.

Identifying Your Goal For The Mentoring Relationship

Why do you want a mentor now, at this time in your career? This is an important question to ask yourself and spend time determining before you embark on a mentoring relationship. Hopefully, you completed the self-reflection/ personal journey described above and have a sense of where you have been, and what and whom have made a significant difference in your professional development to date.

Now you need to spend some time thinking about the future and where you want to be. Sit down, close your eyes and relax. Put a smile on your face as you begin to **imagine yourself five years** from now...totally fulfilled and happy. Don't put up any roadblocks. Let the sky be the limit. To help crystalize your thoughts, ask yourself the following questions:

- What work am I doing?
- How am I making a difference in the organization/enterprise that I work for?
- What impact am I having on others?
- How have I grown as a person/as a professional?
- What skills have I acquired?

Generational Differences

While it is not appropriate to make generalizations about people or to assume that we know them based on where they are from, their sex, their religion, etc.,—it may be helpful to understand the context of the generation they grew up in and how it may differ from the characteristics typical of your generation. Being aware of one's own generation and the attitudes and perspectives you hold that may have resulted from growing up in that era may help you become a better mentee and understand your mentor a little better. Likewise, while not generalizing, understanding the context that your mentor grew up in may be useful as you are asked questions and listen to your mentor's verbal and nonverbal communication. Based on this, we examined what many experts say about the potential impact of generational, cultural and other differences.

Working with Millennials

Those born between 1981 and 2000 are called Generation Y or more commonly, Millennials. This generation craves a work/life balance. They tend to have high expectations of their workplaces, desire flexible work hours and telecommuting, and prefer communicating electronically. They are known for being entrepreneurial and goal-oriented, and desire to make a positive difference in the world. Those in this generation grew up multitasking, being social and feeling confident. Generally, Millennials appreciate instant feedback and recognition. Millennials' No. 1 priority seems to be growth and development.

According to Lois J. Zachary, an internationally recognized expert on mentoring, Millennial mentors should offer hands-on experience that will empower their mentee to take the next step. She states, "They [Millennials] prefer positive, collaborative, achievement-oriented mentors who take them seriously" (2012, p. 53). If you are a Millennial and this is what you prefer, let your mentor know.

Working with Gen Xers

Born between 1965 and 1980, Gen Xers watched their parents work hard to "have it all," and consequently this generation typically seeks a healthy work/life balance. The generation is known for being independent and entrepreneurial. They are largely self-reliant, but value a diverse workplace. Gen Xers seem to prefer immediate feedback and like to communicate via email.

According to Zachary, Gen Xers want a mentor who is not only competent but also one who is direct, yet informal, in their style. She notes in her book, *The Mentor's Guide: Facilitating Effective Learning Relationships*, that due to their independent nature, a hands-off approach may be best in working with Gen Xers. When mentoring a Gen Xer, Zachary advises mentors to "encourage creativity and initiative" and help our "mentees discover new approaches, set expectations, raise the bar and then turn them loose to figure out how to achieve their goals" (Zachary, 2012, p. 52). If this describes you and how you best deal with feedback, learn and develop, discuss this with your mentor.

Working with Boomers

Those born between 1946 and 1964, or the post-World War II generation, are known as baby boomers and tend to be optimistic, competitive and goal-driven. While they may put in long hours and their work/life balanced may be skewed toward work, many boomers just want to make a difference in the world. They seek recognition and reward for their efforts, and expect the same type of commitment and hard work of others. Based on this traditionalist concept, many baby boomers may believe that the right mentoring relationship should be mentor-directed. Boomers are often asked to be mentors because of their desire to make a difference and because they tend to hold senior leadership positions. If your mentor is a boomer and you are feeling that she is directing the relationship rather than helping you learn and develop, be honest with her. Suggest that you would prefer to discover things on your own, while you appreciate her questions, advice and coaching.

Boomers also want and need a mentor at times. When mentoring a boomer, keep in mind that this generation typically wants to be shown respect, appreciates recognition for their accomplishments and likes to be intellectually challenged. Remember that while some baby boomers are tech savvy, some may be reluctant to use newer methods of technology since they did not grow up with computers.

Cultural Differences

In addition to generational differences, it may be helpful to consider cultural differences, as these differences may impact the mentoring relationship. If this is the case, you may wish to discuss with your mentor what mentorship means in each of your cultures, whether organizational or national. Explore how giving and getting advice might be different across cultures, especially if you work at different levels in the organization. For example, in some cultures, directives are expected from people in senior positions, while a suggested range of options might be baffling. Some cultures expect some type of criticism, while others bristle at hearing anything negative. Bottom line, if you are entering a mentoring relationship with someone from another culture, learn everything you can about how your differences might affect your relationship and take this into account as you build the relationship.

Additional Differences

Differences can be good in a relationship, yet it seems to be best if we understand those differences in each other so that we can keep things in context. We described generational differences and cultural differences above but there are many more differences that can impact any relationship, including the mentoring relationship. Age, race, gender, sexual orientation, religion, upbringing and life experiences are all factors that influence how we see the world, how we behave, how we react to people and situations, and how we interpret things.

It is important to keep in mind that the mentoring relationship exists within this context of the two individuals from very different life experiences in some ways. As a mentee, you need to work to get to know and then respect the context of your mentor's life and then consciously try to use it while being sensitive and respectful of your mentor's needs, which may be very different than your own.

For example, say a 50-year-old male is mentoring a 34-year-old male who is a promising young executive. The mentor rapidly moved up the ranks to the C-suite while his wife stayed home to raise their family and he missed many birthdays, anniversaries, athletic events and music recitals. After just one and half years in his current position, the mentee's military wife is being transferred to another city. If the mentor and mentee had not developed a relationship that helped the mentor understand the importance to his mentee to support his wife and participate 50/50 with her in raising their children while growing his career, there could have been a problem with the relationship and the ability of the mentee to move forward with his developmental plan. Instead, the mentor was supportive of his mentee and worked to assist him with networking.

Even though both individuals were males following similar career paths leading to the C-Suite, their backgrounds and experiences were very different. It would have been easy for this mentor to tell his mentee that he was making a mistake. Because this mentor had become aware of his own filters, how he saw the world and recognized that it was just one way to do things, he was able to look at his mentee's way of getting to the C-suite and support him down a very different path.

CHAPTER 2

My Mentor

Role of the Mentor

The role of the mentor is primarily one of facilitating learning and growth and creating and maintaining a supportive environment so the relationship can flourish and learning can take place. Your development as the mentee should always be at the forefront with your mentor, who should be facilitating your self-directed learning.

Perhaps it is effective to state what a mentor is not. A mentor is not the Wizard of Oz behind the curtain that you come to for all of the answers. In fact, one of the main roles of the mentor is to ask good questions so that you come up with your own answers.

Expectations of the Mentor

Your mentor can help you identify goals and discover objectives you may wish to set. She will manage the learning experience and keep you focused on your goals, objectives and learning strategies.

At different points in the relationship, the role of the mentor may take on that of a coach: giving you advice and guidance, sharing ideas and providing feedback. At other times, the mentor can be a source of encouragement and support for you, acting as a sounding board for ideas/concerns or providing insights into possible opportunities.

Your mentor should be a good listener. She should be open-minded and compassionate, patient and honest with you. She may need to deliver some tough love in the form of constructive criticism or honest feedback, serving as a mirror to help you reflect on a particular situation. It will be important that you remain open to this feedback.

Your mentor is also there to challenge you by setting high expectations and encouraging you. They may occasionally play the “devil’s advocate” to help you think through important decisions. She is also there to share some of her experiences with you, not to tell you what to do, but rather to share with you how she may have handled a similar issue or challenge in her career.

Selecting a Mentor

Whether you are asking someone to be your mentor or an organization is assigning a criteria-based match as your mentor, your decision to participate in a mentoring relationship needs to be made after careful, purposeful deliberation.

In Chapter 1 we talked about identifying your goals for the mentoring relationship. With that in mind, ask yourself the following questions:

- Why do you want a mentor? What do you hope she can help you with?
- What qualities would you like in a mentor?
- What are the qualities that are most important to you in your mentor? (Think about the generational, age, gender and other differences that we discussed in Chapter 1.) Which qualities are essential or nonnegotiable?
- Am I committed to getting to know this stranger, investing in the relationship and allowing her to challenge me and help me develop professionally?
- Am I willing to communicate openly and honestly so that my mentor really gets to know me and I her so that we understand and respect the other’s perspective?
- Do I have the time over the next year to dedicate adequate attention to this relationship?

CHAPTER 3

Starting the Journey

PREPARING FOR INITIAL CONTACT

So, you now have the name and contact information of your mentor. You may have some anxiety about where to start, what to say and what to do if the two of you don't immediately hit it off. You can be sure that your mentor is having similar anxiety.

While it is the mentee who is typically the initiator of the mentor/mentee relationship in an organization-sponsored program, it is usually the responsibility of the mentor to make that initial contact. If you don't hear from your mentor within two weeks of receiving her name and contact information, you may wish to take the initiative and reach out to her. Either way, remember that first impressions are important. These first impressions can set the tone for the relationship. If you are the one to reach out, it will be important for you to have an agenda for that first contact.

AGENDA FOR INITIAL CONTACT

Whether via phone, email or Skype, the following suggestions may leave a good first impression and facilitate the development of a good relationship. While this first contact is mostly task oriented, it will lay important groundwork. Before that first conversation, you may want to see what you can find out about your mentor online: Try to find her on LinkedIn, or simply Google her name. Then, for that first conversation:

- Introduce yourself, let your mentor know how you prefer to be addressed and ask your mentor how she would like to be addressed. Learn how to pronounce the name of your mentor.
- Tell your mentor a little about yourself and ask your mentor to tell you a little about her.
- Discuss the needs, expectations and limitations that each of you may have, for example, you may mention that you will not be available on weekends or the last week of the month due to your meeting schedule.
- Agree upon a meeting schedule and whether you will meet via phone, Skype or in person, preferably every two weeks for at least an hour each time, at least initially.
- Talk about the respect for each other's time and thus how best to cancel or reschedule a meeting. Commit to doing your best to keep changes to a minimum and try to obtain agreement from your mentor that they will do the same. Agree on how to communicate the need to make changes in the schedule. Is an email, text or phone call the best way to convey the need to change a meeting or to speak in between meetings if advice or support is required in a crisis?
- End the meeting on a positive note, noting that you are looking forward to getting to know your mentor and to working with her. Thank them for her willingness to be your mentor.
- Let your mentor know that you will develop an agenda for your first meeting. Ask her if she would like you to email the agenda to her in advance.

Remember, relationships take time and they take work. The first few months of your mentoring experience should focus on building a trusting, respectful relationship.

The typical lifespan of a mentoring relationship is six months to a year and often follows the phases described below, which are outlined in greater detail in the forthcoming chapters:

- Starting the Journey—Chapter 3
- Building and Nurturing the Relationship (approximately two months)—Chapter 4
- Working Toward the Goals (approximately two months)—Chapter 5
- Hitting Our Stride (approximately four to eight months)—Chapter 6
- Phase Out/Closure—Chapter 7

CHAPTER 4

Phase 1: Building & Nurturing the Relationship

Expectations for the First Two Months

This is a critical time as you lay the groundwork for your mentoring relationship during these first few months. It is important that you spend the time getting to know one another, preferably meeting as often as every two weeks, if possible. This is the time to get clarity about each other's expectations regarding the relationship, and for both you and your mentor to understand your own skills and gain an understanding of each other's contexts. Do not rush through this phase, as it is critical to the long-term success of the mentoring relationship.

MEETING AGENDAS

You, as the mentee, should be developing an agenda for each session. You want to engage your mentor in meaningful conversation from the start, going beyond job responsibilities and titles and focusing on each other as people—your histories, cultures, what you like/dislike, etc. Hopefully you have completed your self-reflection/personal journey exercise discussed in Chapter 1, so you have some insights about yourself: how you got to where you are, who helped and supported you along the way, and what/whom was most effective in influencing you on your life journey. You can begin to share some of that with your mentor and ask her to share with you a little about her personal journey, current position, culture, likes and dislikes, etc.

Over the course of the first two months, work your way through the suggested agendas below. Try to describe to your mentor where you see yourself headed in your career and what your development goals are. Your mentor will likely have questions about how your goals align with where you want to be. She will be trying to gain clarity so she truly understands you, your goals and what is important to you. Talk about your personal communication and learning style and ask your mentor about hers. Clarify what you are hoping for from this mentoring relationship and ask your mentor what they would like from this relationship. Sample agendas/conversation questions can be found in the tool section of this chapter.

Before concluding each meeting, together review the agenda and what you accomplished at the meeting. Talk openly about whether you each believe that you had substantive versus superficial discussion and whether you each feel that you are advancing in your level of trust. Finally, agree on next steps and the next meeting agenda. This is a time that your mentor may suggest you read something or complete an assessment, such as the ACHE Healthcare Executive Competencies Assessment Tool, to prepare for your next discussion.

Remember the goal of this phase is to build a strong foundation of trust and understanding of each other. This will take multiple conversations over a period of about approximately two months. Before moving on to the next phase, use the checklist in the tools section of this chapter to assure that you have established a firm foundation of trust and understanding.

TOOLS

Agenda	Conversations
Introduction	<ul style="list-style-type: none"> • Tell your mentor about you/ask about her. • Share a little of your personal journey/ask about her personal journey. • Talk about each other's current professional situation. • Talk about each other's leadership values and philosophies. • May wish to discuss ground rules that may assist in building the relationship (see chart below)
Getting to Know You (<i>multiple meetings</i>)	<ul style="list-style-type: none"> • Share some previous mentoring experiences with each other. What did you like/what didn't you like? • Share why each of you want to engage in this relationship. • Discuss what each of you see as your role in the relationship and if your views differ, how to resolve or how the differences may impact the relationship. Try to clarify what you, as the mentee, are trying to accomplish with this mentoring relationship. • Describe to your mentor where you see yourself headed in your career. • Share your broad development goals and how these relate to where you see yourself headed. • Discuss your learning style and both of your personal styles. If either or both of you have your results from the Myers-Briggs or DISC, you can use these tools in your discussion.
Ending Each Meeting	<ul style="list-style-type: none"> • Discuss expectations regarding open and honest feedback with one another and ask for that feedback at the end of every meeting. • Agree upon next steps and the next meeting agenda.

Phase 1: Building & Nurturing the Relationship

Ground Rules For Mentoring Relationship

- We will start and end all meetings on time.
- We will use our agendas to keep us on track.
- We will both participate fully in the conversation.
- We will be open and honest with each other in a respectful manner.
- We will respect each other's differences and not make judgments.
- We will keep our conversations confidential.
- If we come across an issue of disagreement or concern, we will discuss it openly.
- If the relationship does not work out, we will discuss this and see what we can each learn from it.

Checklist Before Moving To Phase 2

- _____ Am I truly invested in my development?
- _____ Do I feel that we are communicating openly and honestly?
- _____ Do we seem to understand and agree upon each of our roles in this relationship?
- _____ Can I commit to adequate time for follow through with any assignments from my mentor?
- _____ Am I gaining trust and respect for my mentor?

CHAPTER 5

Phase 2: Working Toward the Goals

Expectations for the Next Two Months

The good news is that if you have made it this far in your mentoring relationship both you and your mentor are committed to continue. In this phase, you are working as much on the relationship building as you are on the task of addressing your developmental goals. Again, during this phase, it is highly recommended that you continue to meet twice a month, if possible. In this phase, the focus should be on clarifying your goals, developing a plan to tackle these goals and beginning the work. Your objective during this phase is to develop commitment to a set of goals and an approach to moving toward those goals.

You may wish to codify the goals and commitments that you are making to each other in a written Mentoring Partnership Agreement. Some find this helpful to keep them on track toward achieving goals. A sample agreement is in the tools section of this chapter. If you do decide to use an agreement, keep it simple.

Meeting Agendas

While it is important to continue building the trusting relationship, now is the time to begin building the plan. While you may have come to the relationship with a clearly defined goal, most mentees come with only a broadly defined goal. It is important for your mentor to truly understand your goal rather than assume they understand what you mean. Your mentor will likely need to ask you a number of clarifying questions so she comes to understand exactly what you mean and where you want to go. For example, you may say your goal is to move into a position with a better title, higher salary and location closer to your family within the next year. Rather than assuming that she knows what you mean, your mentor may need to ask questions such as "Could you describe what a 'better title' means to you?" and "What do you think is needed in order to reach that goal?" Your mentor is not challenging you or questioning the validity of your goal, she is merely trying to assure that she holds the same definition of your goal as you do.

If you, like most mentees, come with only a broadly defined goal, your mentor can assist you in thinking through your goals and helping you to make those goals as specific and quantifiable as possible. To assist you in creating and aligning your developmental goals with your current role and/or aspirational role or targets, complete the Mentee Developmental Goal Assessment in the tools section of this chapter. Work on examining the gap between your requirements and what an employer or role offers to you, as well as examining what you bring to the table in relation to what an employer or role requires. This gap analysis can form the basis of a work plan and frame discussions for the next phase of mentoring. ACHE also has an excellent competencies assessment tool available online called the ACHE Healthcare Executive Competencies Assessment Tool. This tool can assist healthcare leaders in assessing their expertise in critical areas of healthcare management, helping them better understand what may be needed to reach their desired/future goals or targets.

We stated at the beginning of this guide that mentoring is all about learning and growing. A work plan can keep you and your mentor focused on this learning, growth and development and may help keep the relationship on track. See Sample Work Plan in the tools section of this chapter.

Phase 2: Working Toward the Goals

TOOLS

To create an effective developmental plan, it is important to look at your requirements, what you need to fulfill these requirements, what you currently have to offer and what is required for success. Assess whether these are in or out of balance and if so, by how much and what you must do to bring them into balance. In doing so, you will discover areas in which your skills and attributes are currently relevant or in need of development, as well as determine what factors might increase your level of satisfaction. After answering the questions, you should look for gaps with the help of your mentor, then move forward and develop a work plan.

Mentee Developmental Goal Assessment

<p>Your Requirements For Work/Life Fulfillment</p> <p>What are my values and interests?</p> <p>What do I need to keep my life in balance?</p> <p>What are my developmental needs?</p>	<p>Contributions To Your Work/Life Fulfillment From Your Current Or Desired Role</p> <p>What is the culture of the organization?</p> <p>What benefits will help me achieve this life balance?</p> <p>What are my growth opportunities?</p>
<p>Contributions To Your Current Role Or Desired Role</p> <p>How do I deliver value?</p> <p>What are my skills and talents?</p> <p>What is my competitive advantage?</p>	<p>Requirements For Success In Your Current Or Desired Role</p> <p>What is the mission and key objective for the organization?</p> <p>What skillsets are needed to achieve success?</p> <p>What changes may impact the organization's requirements?</p>

Work Plan for Mentoring Relationship

Mentee's Goal:

Objectives	Action Plan	Resources Needed	Target Date
1.			
2.			
3.			

Sample Mentoring Partnership Agreement

Mentor/Mentee Agreement

We the undersigned hereby agree on the following:

The **goals and objectives** of our mentoring relationship are as follows:

- 1.
- 2.
- 3.

We agree to **meet regularly**. The time committed to this relationship will be as follows:

Our meetings will typically last for one hour and occur twice a month for the first four to six months, followed by monthly meetings during the remainder of our relationship, up to an anticipated period of 12 months. We commit to reevaluating the relationship and both understand that this relationship may end sooner than the originally projected 12 months. Our specific meeting schedule will be as follows:

If either of us needs to reschedule a meeting, we will do so only in a real emergency and will notify the other via phone/text/email (agree on one) no later than _____ (hours/days) in advance.

We agreed to the following set of **ground rules**: *(See sample in Chapter 4, Tools section)*

We agree to provide routine **feedback** to each other and **evaluate our relationship** at least every _____ months by openly discussing our sense of how the relationship is working for us and how we each feel we are progressing toward the mentoring relationship goals as described above.

We agree that when one or both of us feel it is time to terminate the relationship that we will discuss this and either mutually agree to terminate or develop a plan to get the relationship back on track.

Mentor's Signature

Mentee's Signature

Date

Date

Checklist Before Moving to Phase 3

- _____ Goals are clearly defined and understood by both mentor and mentee.
- _____ Mentor and mentee have agreed upon meeting routinely, the ground rules for the relationship and the preferred feedback method.
- _____ Agreement has been reached regarding the expectations and responsibilities of each party.
- _____ A work plan is in place that is based on learning/growth and development with timelines for completing the work and agreement on periodic checks to reevaluate and modify the plan as well as check progress.
- _____ I remain committed to working toward my goals, working with my mentor and following through on her assignments/suggestions.

CHAPTER 6

Phase 3: Hitting Our Stride

Expectations for the Next Four to Eight Months

You have made it to the best part of the mentoring relationship. You have laid a foundation for trust and open communication, agreed upon how you will work together, laid out ground rules and expectations of one another, and have a mutually agreed upon work plan in place. Now, it's time to put the plan in motion. During this phase you will likely want to slowly move to meeting once a month with brief updates in between.

You will now begin implementing your action plan toward your objectives. During this phase, your mentor will focus on supporting you, challenging you and providing the vision of possibilities to help you grow and develop. It is likely that you will often need her support. It is important that you let your mentor know how you are feeling and when you just need someone to listen without judgment. Your mentor may start asking you questions that will cause you to reflect and articulate your own thinking. Ask your mentor if they have ever encountered something similar to what you are encountering or feeling, then have her share some stories from her personal journey that relate to what you are experiencing.

To get the most out of your mentoring relationship, you will need to stretch and your mentor can assist you by challenging you to do things that may take you out of your comfort zone. This can take the form of setting tasks for you, such as "I think it would be good for you between now and our next meeting to arrange an informational interview with ... to get her perspective on" Other ways your mentor may challenge you might include asking what if questions based on different hypotheses or setting high standards for you that may scare you, trusting that you will follow through and at least try.

Whatever you do, do not lose sight of your goals, that future state that you want to reach. Also recognize that you may want to talk with your mentor about stepping back and re-evaluating your goals and objectives and reframing them.

Critical to this phase in the mentoring relationship is feedback. It is the most powerful way for learning to occur. Remember to provide your feedback honestly. Make your feedback relevant, practical and specific, as your mentor cannot read minds. Talk about your fears or insecurities, likely your mentor has experienced something similar. Remember you want to achieve your goals, let your mentor help you and support you. For them to be able to do this, they need your open, honest communication and they need to see that you are working harder than they are toward achieving your goals.

Meeting Agendas

Your meetings should switch focus from what is the goal to how are we doing in reaching that goal. Each meeting should begin by doing a quick review of what was done at the last meeting, how it felt and what could have been done differently now that you each have had time to think about it. Next, update your mentor on your current situation particularly as it relates to the plan and any progress you may have made on your action plan to achieve your goals. What is working, what is not working, how you are feeling about it, etc. Remember to stay focused on the plan and on the purpose of the relationship, which is your growth and development.

To help you decide when it may be time to phase out of this mentoring relationship or redefine it, use the checklist at the end of the tools section of this chapter.

TOOLS

Agenda	Conversations
Start of Each Meeting (Past Focus)	<ul style="list-style-type: none"> • What did we do at the last meeting? • How do each of us feel about it, Are there things we might have done/said differently now that we have had time to think about it. • Review any action items that you both had agreed upon.
Majority of Each Meeting (Current Focus)	<ul style="list-style-type: none"> • Provide an update on your current situation particularly as it relates to the plan. • Provide a progress report on action plan items • Discuss what's working and what is not working relative to the action plan as it relates to achieving the goal. Discuss how you are feeling about your progress and the plan. • Revise objectives and action plan if needed.
Ending Each Meeting (Future Focus)	<ul style="list-style-type: none"> • Agree on actions to be completed before the next meeting. • Discuss expectations regarding open and honest feedback with one another and ask for that feedback at the end of every meeting. • Agree upon next steps and the next meeting agenda.

Phase 3: Hitting Our Stride

Checklist Before Moving to Phase 4

- _____ I am still learning and growing.
- _____ I am still committed to and moving forward in pursuit of my goals.
- _____ The feedback I am giving is honest, thoughtful and constructive.
- _____ We are continuing to build and maintain a productive relationship.
- _____ There are no subjects that seem too difficult to discuss in our relationship.

CHAPTER 7

Phase 4: Phase Out/ Closure

Ending the Relationship

While the location of this chapter may make it appear that closure comes neatly after you and your mentor have developed a trusting, respectful relationship, closure may come at any point during the relationship.

You may have noticed in the sample Mentor/Mentee Agreement in Chapter 5 that the agreement asked both parties to openly evaluate how the relationship is working and if there is a thought or desire to stop the relationship, whether it be one or both of you, that you will have a discussion. Both parties go into a mentoring relationship with high hopes. Sometimes the relationship just doesn't work out. No matter when one or both of you come to the realization that it is time to end the relationship, it is important to discuss it together.

Closure even after a successful mentoring relationship can be challenging and stressful. Sometimes, it may be that one person in the relationship has experienced a life or job change that shifts her attention and ability to focus on a mentoring relationship. Or it may be that you or your mentor are fearful of bringing up the topic of closure to avoid hurting the other person's feelings. Although the relationship may have been professionally fulfilling for both, it has run its course/achieved the agreed upon goals and has consequently grown stale. One or both of you may find it more comfortable to maintain the status quo than to engage in an awkward discussion.

No matter the reason, appropriate closure is important for both parties. To set the stage for the end, it is best to discuss the end at the beginning and periodically throughout the relationship. You may wish to add an item to your agenda every few months such as "How are each of us feeling about this relationship? What do we think about the value and longevity of this relationship?"

Just because the mentoring relationship ends, that does not mean that you can't maintain a relationship, be it as friend or colleague. Don't burn any bridges behind you. Work to have an honest conversation. Provide your mentor with your rationale for terminating the mentor/mentee relationship, listen to what she says carefully and respond to her thoughts in a nondefensive, nonjudgmental manner.

As the mentoring relationship is one of learning, growth and development, the relationship's end should serve as a learning conclusion. The ideal ending conversation should focus on the learning that took place during the relationship—not just the learning as the mentee, but also what your mentor has learned. We all learn from good experiences as well as from the not so good experiences. Look at the pluses and minuses of the relationship. Make every effort to have the ending be as positive as possible.

Phase 4: Phase Out/Closure

TOOLS

Is It Time For Closure?

- _____ I have met my learning goals.
- _____ It feels as though we are meeting just to meet.
- _____ We have been meeting for months and do not seem to be making any progress.
- _____ I have no desire to follow through between meetings on what we discussed.
- _____ I feel there is no value to meeting with my mentor.

CHAPTER 8

Celebration & the Future

Summarize the Learning/Focusing on the Positive

The healthy discussion at closure provides you and your mentor with the opportunity to evaluate the learning outcomes and hopefully discuss how you might build on your learning as you move forward in your career and your life. Look back over the goals that you developed early in your mentoring relationship. Then ask yourself what you learned/accomplished relative to each objective. For example, if one of your objectives was to position yourself for a position with greater responsibility, describe to your mentor the progress you feel that you made toward that objective.

You may be surprised at what your mentor learned about herself. Ask your mentor to share with you what she learned about herself through this relationship. That conversation may go something like this:

Mentor: I have observed that you have grown more sure of yourself over the past year.

Mentee: You know, you're right. I do feel more confident and am now giving my opinions more often at meetings.

Mentor: That's terrific! You have taught me a lot about patience and the importance of listening this year. I am finding that my leadership team is being more open with me, so thank you.

Most of us have had a number of mentors at different points in our lives. Many of them have remained a friend or colleague that we touch base with periodically or think of from time to time with fondness. Ending the formal mentoring relationship should be done in a way that is focused on the future and leaves the relationship open to evolve into something different.

Celebrating

Most of us don't take the time to celebrate, we often look at something as done and move on to the next thing. However, celebration at the end of the mentoring relationship is important as it reinforces the learning that has taken place and helps with transitioning to the next phase, much like the graduation ceremony did when we completed our degree.

Some suggestions for celebrating may include a face-to-face get-together if you have been mentoring via computer-mediated methods. A written note expressing your gratitude to your mentor can be an expression of celebration, providing a permanent reminder of the relationship and its successes. You and your mentor may wish to exchange a meaningful memento. Any mementos should not be expensive—perhaps a book of reflections that will help continue the learning that began during the mentoring relationship.

The Future

Take the time to be honest about whether there will be a future relationship.

If you do wish to continue the relationship, agree whether it should be touching base periodically over email or phone or something more formal such as setting new learning goals and continuing the mentoring experience.

Whatever you agree upon about the future relationship, know that each of you will likely feel a loss. You have bonded over the past year or so. You have confided in each other and learned together. Your mentor may worry about you or wonder how you are doing. You may miss the support and feedback your mentor provided. The good news is that you may likely hear from each other when you least expect it over the years. A voicemail, email or note letting her know about an accomplishment may unexpectedly make her day.

Now that you have agreed upon your future relationship with your mentor, it is time for you to do a self-evaluation. See the tool section of this chapter for a sample self-assessment tool. Perhaps you should add this experience to the personal journey reflection you did at the start of the relationship. Ask yourself: How has this mentoring experience changed you? What did you learn from this relationship? How can you use what you learned in future mentoring relationships? Are you ready to be a mentor and/or to select another mentor?

You learned and/or practiced many skills as a mentee. The first of these was **reflection**: looking at your life, your personal journey, where you have been and where you wanted to go. You started reflecting in preparation for your first meeting with your mentor and honed that skill throughout the entire relationship.

As the agenda setter, you actually became the facilitator of the conversations and **facilitation** is key to being an effective mentor in the future. As a mentee you had ample opportunity to practice your **listening** skills, listening to your mentor and reflecting on her words and ideas.

Hopefully you not only received much **feedback** over the course of your relationship, but you also provided open and honest feedback to your mentor during this time as you worked to build a relationship of trust.

These are four of the vital skills of a mentor. So, think about it. Think about your abilities to effectively use these skills. Then answer the following questions: Do you enjoy helping others? Would you like to help another person succeed professionally? Do you enjoy helping others learn more about themselves and set and achieve their goals? If so, consider becoming a mentor.

TOOLS

Take a moment to reflect on your experience by completing the following:

Mentee Self-Assessment

	Never	Sometimes	Usually	Always
I made myself available regularly, established the agendas and followed through on any assignments.				
I was truly present during our conversations.				
I shared personal experiences and information openly.				
I was satisfied with the level of trust we achieved in our relationship.				
Our discussions were substantive.				
I established solid goals and objectives.				
I met my learning goals and objectives.				
We had a good discussion about closure.				
I feel good about the mentoring relationship.				
I am considering becoming a mentor.				

In addition to your developmental learning, what were your learnings about the skills that make a mentee/mentor relationship successful?

CHAPTER 9

The ACHE Leadership Mentoring Network

ACHE created the Leadership Mentoring Network to expand opportunities for learning and development exclusively for ACHE members. This service is not intended for students, nor is its intent to find employment for mentees; rather it is designed for healthcare executives who are employed full-time and are seeking growth as leaders and professionals.

The Leadership Mentoring Network maintains the classic one-to-one mentoring experience, while relying primarily on a contemporary combination of communication channels such as phone, email, Skype and FaceTime. Face-to-face meetings will likely be the exception, not the rule. Using this approach, mentoring partnerships can develop even between individuals separated by great distances. Mentoring partnerships initially are expected to be established with a specific purpose and for a limited time. Successful mentoring partners are encouraged to expand their focus and continue their relationship as long as they wish.

Prospective mentors and mentees must file a personal profile with ACHE's Career Resource Center at ache.org/Leadership-MentoringNetwork so that CRC may identify appropriate matches.

To help you decide whether this mentoring approach will work for you, consider the following checklist:

- _____ I am seeking a mentoring option that is flexible regardless of my career stage or level in my organization.
- _____ I am interested in a mentoring relationship that may occur through email and telephone communication, not requiring face-to-face interaction.
- _____ I am looking for a mentoring experience that is development driven; that is, as mentee, I will identify specific leadership development goals to work on within the mentor-mentee partnership.

_____ I am comfortable with a loosely structured approach to mentoring that is worked out by the mentor and mentee.

Note: The Leadership Mentoring Network operates thanks to the service of dedicated volunteers. While their numbers are growing, their supply is finite. Consequently, we must limit the mentor and mentee pairings to ACHE members who currently hold healthcare management positions.

Other Options for ACHE Members Considering Participating in Mentoring

In addition to the national ACHE Leadership Mentoring Network, some ACHE local chapters have mentoring programs uniquely tailored to their own environments. For example, local mentoring programs may be designed to help Members pass the Board of Governors examination. Others may help early careerists to grow and prepare for greater responsibilities in the future. Use the Chapter Directory to find the chapter in your area for further information at ache.org/Chapters.

Members who are in full-time education, training or job search modes may instead consider the benefits of ACHE's Career Management Network. The network consists of a different pool of volunteers who have agreed to be resources for individuals considering career directions or making transitions between healthcare sectors or locations. Learn more at ache.org/CareerManagementNetwork.

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Tequia Burt

The Benefits of Mentoring

Explore opportunities at ACHE.

One of the most critical responsibilities for today's leaders is cultivating strong leaders for tomorrow. A growing number of top-level executives are committed to leadership development in their organizations, as well as within the healthcare field.

ACHE has always strongly supported mentoring efforts. Besides establishing the Leadership Mentoring Network (LMN) in 2001, ACHE offers Diplomates advancing to Fellow the opportunity to provide a formal, yearlong mentorship as one option to fulfill their Fellow project requirement. Always looking for ways to enhance mentoring opportunities, ACHE has begun exploring mentoring on the chapter level.

Leadership Mentoring Network

According to Reed L. Morton, Ph.D., FACHE, director of ACHE's Healthcare Executive Career Resources Center (HECRC), the LMN has two goals. "The first goal is to help the protégé become more effective as a leader," Morton says. "The second is to introduce senior-level executives to mentoring and to encourage those who have been mentored to consider mentoring in the future." The network is not intended for students, nor is it intended to find employment opportunities for protégés. Rather it is designed for

experienced healthcare executives seeking growth as leaders and as professionals.

The LMN maintains the classic one-on-one mentoring experience, while relying primarily on phone and e-mail communication. This makes geographic proximity unnecessary and allows busy healthcare executives to easily participate in the program. ACHE also offers online support to those interested in the LMN. Visit ache.org to download the *Leadership Mentoring Network Manual*.

Since its inception, the LMN has matched more than 400 ACHE affiliates with volunteer mentors. Morton and his staff pair mentor and protégé based on specific responses from personal profiles that all prospective participants complete online. "Protégés tell us what they are looking for in a mentor and then we ask questions like: Do you want a mentor who is of the same gender? Who is in the same field? Who is of the same race or ethnicity?" Mentors also can request a protégé in a specific type of organization or with particular career goals. Although ACHE has more than 700 mentors in its database, sometimes matching up prospective mentors and protégés requires a little extra work.

If we can't find a match, we'll go out and recruit people we know might be

a good fit with a particular protégé," Morton says.

Fellow Mentorship Project

The LMN is a good resource for time-strapped executives, but ACHE also provides mentoring options for those interested in face-to-face encounters. "The LMN has been very successful," Morton says. "But it can't truly match the impact of face-to-face contact in a single geographic setting."

For those who are advancing to Fellow status, mentorship provides one option. This opportunity involves a structured and in-person approach. As part of the Fellowship project, candidates must submit a four- to eight-page mentorship proposal that exhibits a commitment to the project and illustrates the value to the protégé and to healthcare management. Throughout the year mentors are required to formulate a professional development plan along with their protégé, and submit three quarterly reports and a final report.

People who chose this FACHE option are positive about their experience.

“In many ways, the mentorship option forced me to take a more proactive approach to my own professional development and dig deeper into why I behave and lead as I do,” says Paul Ortiz, FACHE, director, University of Texas, MD Anderson Center. “The intangible value was gained in developing a lifelong professional relationship and helping prepare the next generation of healthcare leaders.”

Chapter-Level Mentoring

ACHE also supports mentoring on the chapter level. Many chapters have already introduced mentoring programs that are both popular and successful. The ACHE of North Texas chapter has had a thriving, structured mentoring program for the past ten

years. “Our program is extremely popular,” says Paula Zalucki, ACHE Regent for Greater Dallas–Fort Worth Area and president-elect for ACHE of North Texas. “At first people are reluctant because of time commitment issues, but often we’ll get senior executives who want to return the next year because they had great experiences.”

To support these efforts and to provide assistance to chapters without the means to establish a mentoring framework, ACHE has developed online software to help get chapter mentoring programs off the ground and running. In 2005 HECRC launched this chapter-level effort in collaboration with ACHE’s Detroit-area chapter, Michigan Healthcare Executive Group and

Associates (MHEGA), and created the online MHEGA Chapter Mentoring Program. The software is based on the same format as that of the LMN and is now available to all chapters.

After MHEGA chapter members log in, they are provided with an alphabetical list of all members of the MHEGA chapter by name, by company and by city and state. Clicking on an individual member’s name allows access to even more detailed information. Chapter mentoring programs also can benefit from ACHE’s other online resources, such as advice from experts, articles and an audio conference on “The Art of Mentoring.” These resources can be found in the Affiliates Career Resource Center on ache.org.

The best advantage to mentoring initiatives on the chapter level is that mentors can meet protégés face-to-face, and the approach can be flexible enough to meet the particular needs of the participants. Chapters are free to make mentoring programs available to students. The benefits are enormous. “A lot of senior executives don’t realize the advantages of mentoring,” Zalucki says. “They discover that bringing a protégé to events like board meetings or standing committees can generate new ideas on projects that we all take for granted and that helps you grow as a person and as a leader.” ▲

For information about LMN, contact Reed L. Morton, Ph.D., FACHE, at (312) 424-9444 or rmorton@ache.org. For information on the Fellow Mentorship Project, contact Patricia Griffith, FACHE, at (312) 424-9377 or pgriffith@ache.org.

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Diane B. Kriegel, RN,
FACHE

Mentoring and Preparing the Next Generation

Critical skills are best learned when passed from leader to leader.

The healthcare field has always been characterized by its complexity. While the tools and methodologies for dealing with that complexity have changed since I first began my career, the fundamentals have not. The art of listening, reading people and reacting appropriately are nuanced skills that will always be requisites for leaders in our field.

But they are not skills that can be easily delineated in a textbook. Rather, they are best acquired by following the example set by other successful leaders. I was fortunate to be mentored early in my career by someone who guided me while demonstrating the skills and attributes that were ultimately essential to my career success and fulfillment. Thus, as I became a more experienced healthcare executive, I was compelled to “pay it forward” as it were and reach out to young healthcare leaders who could not only be good at what they did, but could be great.

In the late 1980s as the director of the Pasadena Laser Center in St. Petersburg, Fla., I was putting together a laser program for the surgical specialists at Palms of Pasadena Hospital. As part of my duties, I met periodically with the hospital’s Laser

Committee to discuss policies and procedures as they related to the hospital’s laser program. During those committee meetings, without fail, a particular physician leader and I would clash. Reynold J. Jennings, FACHE, was the executive director of the hospital at the time and participated on the committee as well.

Recognize Mentoring Opportunities

After witnessing the tensions between the physician and me several times, Jennings scheduled a meeting with me. He recognized my potential, drive and commitment to the project; but at the same time, he also saw my struggle as I tried to rein in my feistiness as I interacted with the physician. Jennings knew that the difference between succeeding in my role and failing depended on finessing my communication skills.

That initial meeting changed my professional life. Jennings coached me on how to conduct myself in a confrontational situation. “Make your statement, sit back and wait for a response,” he said. “Listen to his response. If the physician lashes out, don’t take it personally and don’t become defensive. Look at him when he is speaking and

acknowledge that you have heard.” Instinctively, I may have known this was the most effective way to handle the situation, but at that point, I had not seen that behavior modeled in my career. Those skills were not yet part of my toolkit—and certainly not something I had learned in my formal classroom education.

That first coaching session with Jennings evolved into a four-year, informal mentorship. When the laser program started at Pasadena, the committee meetings ran weekly, then monthly after the first year. Jennings committed to meeting with me for an hour prior to those meetings to review the agenda, update the issues that had developed since the last meeting and proactively consider issues that might be on the table for the upcoming meeting. Under Jennings’ guidance, I thrived in my role and was able to deal more effectively and productively with all committee members.

I left the laser clinical area after eight years to pursue my master’s degree. Upon completion of my master’s, I was hired as the director of Services Development and Implementation for the Eastern Division of a major healthcare system, reporting to Jennings, who had become president of that division. In this role, I was actually a corporate employee, and as such,

Careers

the waters were a bit more treacherous for me. I had always believed that my passion for patient care and my ability to do my job well were all that mattered in being successful. But I quickly realized that hospital-physician relationships and having a “give and take” approach factored heavily not only in my personal success, but also in creating a productive, efficient and high-quality hospital environment.

Seek Continuing Guidance

Once again, recognizing that I needed guidance, Jennings and I restarted our regular meetings during which I learned the importance of staying on point during discussions with senior-level colleagues

and physicians by knowing and stating the facts without surmising or embellishing. Respecting everyone’s time and knowing the appropriate tone for any given situation were other lessons that became critical to my success.

This kind of in-the-moment, tailored learning opportunity can only happen through a mentoring relationship. It is *the* most powerful educational tool we can provide our early careerists. As my career progressed and I became a healthcare consultant, I began to seek out younger staff who possessed natural intelligence and drive but lacked the interpersonal skills that define a respected leader.

Pay It Forward

Because of the learning opportunities I had with Jennings as a mentor, I realized the importance of showing people the gray areas. For example, rather than simply assigning budget responsibilities to nursing directors, I took time to educate them on how to communicate with CFOs to accomplish their goals. In another instance, a perioperative director was concerned about the performance of one of her supervisors. After spending time with the supervisor, I realized she had much to offer but lacked the confidence she needed to succeed. While our mentorship was informal in the fact that nothing was documented, it was formal in so far as we met each day. I

asked her questions such as what we could have done differently the day before, her opinion about the way a meeting went, how she thought we could gain the buy-in of a certain physician or what the next step in getting from point A to point B might involve.

She had definite answers to these questions; the problem was that she had never been asked to project what the end result might look like and what it would take to get there. Simply articulating these answers to an objective source gave her the confidence to accept responsibility and ownership of her department, rather than defer to her director. This pay-it-forward approach required only a bit of extra effort on my part, but it made a world of difference to her performance.

Many times our early careerists can benefit from the coaching of someone from the outside looking in. Without my mentorship with Jennings, I am not sure I would have been aware of that need—or even willing to extend myself. But because I experienced the benefit of that relationship, I knew just how essential it can be to someone's success.

I have found that being a mentor has been incredibly rewarding because it:

- Reinforces the lessons I have learned over the years and keeps my own skills sharp
- Contributes to my colleagues' ability to come out of their shells or receive praise for a job well done when previously they had not been recognized

- Satisfies my need to contribute to the betterment of the individual and the organization

The skills I learned from Jennings, and in turn have shared with my colleagues, are those that are best learned as they are passed from leader to leader. The

importance of taking the time to work with an early careerist in your organization cannot be overemphasized. ▲

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Momentum Early Careerist Newsletter

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Mentoring and You

By Steven G. Kelly, DHA, FACHE

Using a mentor is a common approach to help you achieve your professional development and career advancement goals, but many young healthcare professionals don't take advantage of this great opportunity simply because they don't ask.

I like to say, "You have not because you ask not." Most senior executives will be glad to serve as an adviser, but you have to let them know your desire to be advised. You need to have the self-confidence to approach a potential mentor, but it requires more than just possessing the nerve. What is important is that you identify needs in your professional development that you want to concentrate on.

Once you have done your homework assessing your developmental needs, one of the first mentor sources you should look at is your own organization. Many organizations have a mentor program. Participants at Newton Medical Center's mentoring program, for example, use a structured professional development plan to support their career goals and connect them with a senior leader. If I'm chosen as the mentor, the plan may call for the mentee to shadow me so she can gain experience and knowledge that is difficult to obtain in her assigned work environment. I touch on the basics of what it takes to be an effective manager and leader, but I also advise her to take advantage of opportunities as they arise beyond the structured mentoring plan such as working on a project in another department.

Mentoring is certainly helpful for early careerists in strengthening and understanding a variety of administrative areas such as revenue cycle management, quality measurement, corporate compliance and other specific areas that will build your reservoir of knowledge. But one of the most important areas you can work on using a mentoring program is strengthening your relationship with physicians. At many organizations a healthy relationship between management and the medical staff doesn't always exist. This is one area that even I continue to work on. You should be cognizant of the fact that institutions will rise and fall based on their relationships with physicians.

If you are unable to find a mentor at your organization, an outside resource I have found effective is ACHE's Leadership Mentoring Network. Working with my ACHE chapter, Kansas Association of Health Care Executives, the mentoring network matched an early careerist's development needs with areas in which I am proficient. For the past two years I have mentored over the telephone a young assistant administrator from Arkansas. It has worked out well for both of us. We have discussed his career and professional development goals, and I have assessed his strengths and counseled him on opportunities for improvement.

A key requirement—and fundamental to success—of the mentoring program is for mentees to establish what their goals for the mentoring relationship will be. The mentee's answers help the mentor clarify expectations, including what kind of learning or development outcomes are being sought.

Each month Wiseman emailed Knight the topics she wanted to discuss to help him prepare. "We focused our time on the objectives I set forth, and then we would identify follow-up items for our next session," says Wiseman. The two live more than 200 miles apart, so their conversations took place over the telephone.

For a structured mentoring relationship to succeed, says Knight, it is vital for the mentee to drive the process. "It is important that they are motivated to be in that kind of relationship and have clear goals," he says.

ACHE's Leadership Mentoring Network program recommends mentees try and achieve their goals for the relationships within 12 months—Wiseman accomplished hers in nine, though she continues to seek advice from Knight.

Wiseman says she highly recommends the program and appreciated that Knight didn't just provide advice, he "knew how to ask questions that would make me think about a situation differently or challenged me in a way I hadn't been challenged before."

Adds Knight: "To advance your career you need to have a network of people you can consult with and have conversations with. You really need more than one person's perspective. One of them might be more helpful than others, but having multiple viewpoints provides a more grounded assessment of your career development."

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The Mentee-Mentor Relationship and Your Career

By John M. Buell

When Megan M. Wiseman left the hospital system she was employed with two years ago to work for a consulting firm, like any ambitious early careerist she wanted to strengthen her skills in her new, exciting field.

While executives at her company trained her well on the intricacies of the consulting world, she also wanted an outside perspective that would give her the additional career development edge she sought.

Wiseman, who is a manager, health industries advisory, for PwC, and lives southeast of San Francisco, has been associated with ACHE since 2008 when she was a graduate student and also working full time. Now a Member, she turned to ACHE's Leadership Mentoring Network last year to match her with a mentor.

The program's purpose is to expand opportunities to learn and develop as healthcare leaders and professionals. "I was new to consulting and wanted a mentor who had extensive experience in this area who could help me navigate the opportunities available to me in this field," says Wiseman.

"I also wanted help with my long-term career goal of someday becoming a hospital executive," she says. "In addition, I wanted someone to help me understand what skills I needed to work on at this point in my career to help me eventually make that transition."

ACHE's Healthcare Executive Resource Center reviewed Wiseman's mentorship application and connected her with Mark V. Knight, LFACHE, who not only has operated his own consulting firm for several years but prior to that was executive vice president and COO of Covenant Healthcare System and CEO of St. Francis Hospital, both in Milwaukee.

Knight, who lives north of San Francisco, was eager to serve as Wiseman's mentor. During his career, Knight informally mentored many junior executives as part of his interactions with early careerists to help them succeed. "A big part of the relationship I had with the people I worked with was developing and mentoring future leaders and helping them make their long-term career goals come true, either in the organization I was leading or involved in or helping them find a better position elsewhere."

While Knight had informally mentored emerging leaders during the course his workplace interactions with them, he hadn't served as a mentor exclusively for an early careerist in a structured program and was looking forward to the opportunity. Wiseman was just as enthusiastic to learn from her new mentor.

Even after you have investigated sources for a mentor, you may still find yourself hesitant in seeking help. One reason for this is you may believe you're too old or that you don't believe your position warrants using a mentor. You are never too old—and even C-suite positions need a mentor. I recently mentored a 32-year-old chief operating officer of a small hospital. I provided him with general advice on what it takes to be a successful leader. I've also mentored executives in their 40s and 50s.

I have been in the healthcare field for 37 years and mentored many emerging leaders formally and informally. Most senior executives feel an obligation to get involved in developing future leaders. If you are eager to learn and willing to share your development needs, then all you have to do is ask.

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Long-Distance Mentoring Tips

By Michael A. Broscio

In an ideal world all mentoring would be face-to-face. These days, organizations have multiple locations, sometimes widely dispersed. Plus, time is at a premium in this challenging era of healthcare. So you may be connecting with a mentor who is not necessarily located in your geographic area. But with preparation, planning and today's technology, a long-distance or "virtual" mentoring relationship can work well.

Points to Keep in Mind

Let's look at potential challenges with a virtual or long-distance mentoring relationship. They include more limited communication options and potential difficulty in creating the connection that's important to such a relationship. So how can you optimize your efforts?

1. **Manage expectations:** It is important to establish expectations early to ensure a good launch to the partnership. Before the first meeting, have the mentee explain his expectations, summarize your understanding and then articulate the agreement.
2. **Establish guidelines:** Be sure you agree on frequency and length of meetings, best times of the day to meet, setting an agenda, best methods of contact and confidentiality. Sessions should be postponed only if absolutely necessary.
3. **Build rapport:** If at all possible, meet face-to-face early in the relationship or use Skype or other video conferencing tools for early sessions to facilitate the connection.
4. **Be adaptable:** Developing an agenda for each conversation is important to stay focused, but allow for discussions that may take things in another direction. Some parameters will guide conversations, but too many may stifle them.
5. **Make the commitment:** In a virtual relationship, it may be easier to postpone or cancel a session, so mutually agree on the level of commitment needed to make this a successful process.

Phone or Online Video Communication Platform Meetings

To run an effective phone or Skype type meeting, a clear agenda for the mentoring session is necessary, but build in some time for additional topics or questions. Make sure you are free from distractions and have the necessary resources available or within reach.

Although the content of distance and face-to-face meetings are similar, virtual mentoring communication is different mainly due to the limits of observing each other's reactions. Careful listening to tone and volume of voice is important. Nonverbal cues will be harder to detect, but as the relationship develops, work at developing that "sixth sense" needed to enhance the process.

Some tips for both mentors and mentees include:

- **Tuning in to nonverbal signals:** Listen for voice inflections and raising or lowering of volume, sighs, periods of silence and similar signals.
- **Using active listening:** Check in by asking "What I hear you saying is...", "How do you feel about that..." or "Can you elaborate on that..." This will help confirm that you are both on the same wavelength about the topic.
- **Summarizing discussions:** Close the meeting by summarizing what you believe has been agreed to, which will also help set up the next conversation.

While sending emails may be convenient, it shouldn't become a dominant way of communicating. Email is fine for setting up meetings, asking questions and can be helpful in maintaining a sense of connection between sessions. But email is not the best way to give feedback or discuss sensitive issues.

Can a long-distance mentoring relationship be effective? If the partners are willing and able to make the commitment that's needed and follow some basic guidelines, the relationship should develop and gain the desired outcome. It's worth the investment if it positions the mentee to successfully move to the next level in his career.

Mentoring Options

Alternatives to the traditional one-on-one relationship.

By Michael A. Broscio

One-on-one mentoring certainly is the preferred form of mentoring, but the restrictions of time and resources in today's fast-paced healthcare landscape can limit opportunities for people who are eager to gain knowledge and guidance from experienced leaders. As communication and technology advances continue, alternative mentoring approaches are emerging. These include various forms of group mentoring. Group mentoring can create the opportunity for an organization to extend its mentoring efforts and reach more people. It is a potential solution to the challenge of mentoring people when there is a limited number of qualified volunteers and is a way to share the knowledge and wisdom of experienced colleagues.

Defining Group Mentoring

Group mentoring involves individuals who desire to participate in a mentoring experience to achieve specific learning and development goals. There are various forms of group mentoring. It may be a facilitated mentoring group, peer-group mentoring or team mentoring.

Mentoring Group:

Facilitated group mentoring allows a number of people to participate in a learning group and benefit simultaneously from the knowledge of an experienced professional or leader in the field. The group is enhanced as each member brings personal experiences into the discussion. The facilitator shares her own personal experiences, offers feedback and responds to questions.

Peer Mentoring:

Peer-group mentoring brings together peers with similar interests or goals. The group is self-directed and self-managed. It takes responsibility for developing its own learning agenda and for managing the process. The participants share their own personal experiences and provide feedback.

Team Mentoring:

Team mentoring is best used for facilitating the learning of an intact team. Participants develop learning goals and work with one or more leaders/mentors who provide guidance, but allow the team provide support and share each other's experience and knowledge.

Assessing Group Mentoring Options

Group mentoring should provide a learning experience that facilitates sharing of knowledge and expertise. Some questions to consider before you move forward include:

- What are the goals for the group mentoring process?
- What professional development concerns should the group focus on?
- What might be the obstacles for the mentoring group's success?
- What resources are available to the group?
- How will you measure success?

Using Technology

Technology opens new possibilities for mentoring. Some organizations, in particular, professional associations or membership groups offer an "e-mentoring" approach where a collection of experienced professionals respond to questions and share their knowledge with members for a pre-determined period of time.

Mentor Blogs have emerged from a variety sources and can offer advice and knowledge sharing to those in a particular industry/field or with a common purpose and allow for interaction with participants.

Podcasts Many organizations produce or make available useful content from experts in digital format for automatic download on the Web.

YouTube videos from experts in the field can cover a host of topics from "how-to" to step-by-step instructions to sage advice. TED Talks, for example, is a popular set of conferences offering "ideas worth spreading." The TED Talks website hosts an archive of recorded presentations from a variety of well-known speakers.

The Future of Mentoring

One might argue that these approaches are not true mentoring and most would agree that the traditional one-on-one relationship is best. However, these new approaches using available technology can disperse valuable knowledge and advice to a large audience. The result can be increased learning and development, which is the goal.



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