

Action Steps for the Mentoring Relationship

- 1. Initiate a mentoring relationship by mutual agreement.
 - a. Discuss roles and responsibilities.
 - b. Collaborate to choose the type of mentoring relationship that best fits your situation.
- 2. Get acquainted, optimally by meeting outside of the work environment. Build trust by openly sharing and discussing issues.
- 3. Develop mutual expectations and boundaries. Discuss accountability of both parties at the beginning of the relationship. Discuss confidentiality.
- 4. Discuss ethics, including conflict of interest issues, and agree upon ethical boundaries. When applicable, ensure congruency with AAHA policies and protocols.
- 5. Discuss a vision plan (i.e., overall purpose / long term goal of the relationship)
- 6. Establish, clarify, and write down goals to achieve the vision.
 - a. Define and prioritize areas of greatest needs, with the mentee taking the lead rather than relying upon the mentor to define needs for them.
 - b. Use SMART goals * (Specific, Measurable, Attainable, Realistic, and Timely) for mentor and mentee, as well as shared and/or consistent hospital goals.
 - c. Personalize goals to fit the needs of the mentee. Examine the mentee's concerns and fears when establishing goals.
- 7. Discuss and negotiate a schedule for meeting together.
 - a. Establish formal meeting times to discuss "how things are going."
 - b. Determine meeting location.
 - c. Plan for your discussions, with the mentee taking the lead in planning.
 - d. Create a process whereby a mentee can ask for immediate help as needed.
 - e. If most meetings are virtual, also schedule occasional face to face meetings.
- 8. Establish a protocol to help the mentee develop new skill sets in areas such as surgery, medial records, client communication, and other areas of interest.
- 9. Discuss expected outcomes and how those will be monitored or measured. Set up an evaluation process (including the time, place, and procedure) to evaluate the mentee's progression towards goals.
- 10. Discuss how to resolve conflict.
- 11. Create a time frame for the relationship that is beneficial to both parties. Clarify a mutually agreeable endpoint or time for renewal of the relationship.
- 12. Celebrate progress and accomplishments.

* Doran George, There's a S. M. A. R. T. Way to Write Management Goals and Objectives., Management Review (AMA Forum), November 1981, pps. 35-36