

NCURA Region IV Mentoring Program Task Force

Report to the Region IV Board, Spring 2011

Task Force Committee:

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Discussion:

The Committee met once in person at the national NCURA meeting in Washington DC, on two conference calls in the winter, and through multiple email exchanges.

Three areas of mentoring: We first discussed mentoring program ideas, and defined three areas of mentoring that will support the members of Region IV:

1. Guiding and navigating – this kind of mentoring is characterized as welcoming to new members:
2. Mentoring for leadership - a more formal program with study materials and milestones (similar to LDI) to develop leadership within the region
3. Mentoring for the workplace - job shadowing in the workplace

Discussion of the program ideas follows. In short, the committee is interested in further discussion to developing and implementing a Region IV mentoring program that supports all three areas of mentorship. Mentoring for leadership and a portion of workplace mentoring require more discussion and planning from the committee. We are ready to move forward on guiding and navigating, with some pieces of workplace mentoring built in.

Guiding and navigating discussion

Discussion 1: NCURA, both at the regional and national level, is already doing this very well so we don't want this new option to be a redundancy of what we already have. One of the things that can help the newcomers is that they get help before the conferences in choosing the adequate sessions to attend. Even though most of the newcomers already

discuss the sessions with their supervisors; there may be others that don't have that privilege. Second, newcomers will be happy to shadow another more experienced person that can introduce them to others, etc.

Discussion 2: It would be easiest to take the guiding and navigating type of mentoring and begin with it. We do a pretty good job of new member recognition and encouragement at our physical meetings, but we might be missing out on the opportunity to welcome new folks to the profession and/or organization that haven't had the opportunity to attend a meeting. Maybe that's a smaller candidate pool, but new members within the past year or so that haven't had the opportunity to go to a meeting. We can, of course, do some "in-house" welcoming, but it would make a good impression for contact to be made from outside the institution, especially for those institutions that might not have a large NCURA membership.

Mentoring for leadership discussion:

Discussion 1: This is a hard one to achieve. One concern is that if NCURA national decided to drop this program, why do we want to have one? If we decide to have one, we should consider to contract outside faculty. For example, the Lake Forest College, located at Lake Forest, north of Chicago, is recognized for its leadership program. They offered three sessions, three days each and they can focus the program in research administration. NU Kellogg has recently offered a leadership program (5 to 6 weekends) to faculty from Engineering and the Medical School. Would it be possible to ask those Midwestern Business Schools to help us to develop the leadership program for our research administrators? If we could convince them that preparing leaders in research administration will benefit all Midwestern universities, they may be able to come along. I think the success to this program will depend on the caliber of the faculty, then why not using the experts in the field?

Discussion 2: There is interest in the membership for this type of mentoring. Let's first survey the group and find out the level of interest. Then continue this discussion with who would benefit from the leadership mentoring: Region IV, NCURA National, or the members' home institution. Answering these questions will help guide our development.

Mentoring for the workplace discussion:

Discussion 1: We may start soliciting mentors that can be reached to discuss issues that fall under the level of expertise (research accounting, pre-award, compliance issues, intellectual property, contracting, etc.). The committee will approve the mentors and it may put certain requirements about how to handle the volume, on whether we want only selected mentees to reach the mentors or anyone who needs help, etc.

Discussion 2: Then we can move to a more structured system, similar to the one in Region VI, in that the mentors and mentees are approved by the committee and they are paired. Again, requirements should be set up to make sure that any mentor-mentee interaction is supported by written resources material, and that progress is monitored after one year and presented to the Committee.

Discussion 3: Later on, we can incorporate another option, workplace shadowing. Mentee will attend the mentor's host institution either one week or at least two days each quarter for one year. The host institution will have to commit computer resources, space and the mentor or mentor's delegated person time during the visit of the mentee. The mentee's institution will pay for the travel, lodging, etc. The mentor will be responsible to monitor the activities and to present a detailed progress of the mentee to the Committee.

Discussion 4: There are similar schools dealing with similar issues; being able to meet in the area where the work takes place provides such a great opportunity for learning. We hire consultants to help us because of time crunches, yet taking the time to foster these relationships, with specific milestones/topics to be reviewed during the shadowing, would ultimately save resources down the road. Given that there isn't a conference fee, costs should be lower for the shorter travel distances and lodging costs.

As far as criteria, this could be more of matching interests and be less formal. Or, if there is an expert in the field (let's say NIH training grants or Recharge Centers, for example), then people could submit a request to shadow and those application could be evaluated if there are several interested.

Input from Myrta:

Our committee also reached out to Myrta to hear if and how other regions had developed a mentoring program. Since the LDI program is now replaced by the executive training program, it makes sense for regions to begin offering their membership. A few regions have already rolled out mentoring programs to their region, and the remaining regions are developing programs along the same timeline as region IV. Following are notes from our discussion with Myrta:

Region VI: This region has a well-developed program. A significant amount of effort went into developing this program. It took at least a year to develop. Of the mentoring programs out there, this is the most similar to LDI. This program requires a huge time commitment from both mentors and mentees, and has received great feedback from membership.

Region II: This group just rolled out a very simple guiding and navigating program. They reached out to new members before the 2010 annual meeting and provided buddies (mentors) for the meeting.

Region I: A great starter program with a two-pronged purpose: 1) a mentoring relationship for professional development and, 2) a way to encourage mentees to get involved.

Priorities:

Priority 1: The committee suggests that Region IV start with a guiding and navigating mentoring program and phase in leadership and job shadowing mentorship. We propose moving forward with a guiding and navigating mentoring program, which also encompasses pieces of workplace mentorship. We reviewed the Region I program and propose implementing a similar program here in Region IV. We have written approval from Region I to use their materials and we can tweak the documents to fit Region IV. (see following)

NCURA Region I Mentoring Program

The NCURA Region I Mentoring Program is a unique opportunity available only to Region I members. This program enables newcomers to quickly and easily network with seasoned NCURA professionals who have volunteered to share their expertise, guidance and support.

How it Works

Volunteer mentors and mentees are matched based upon criteria such as specific area of interest, institution type, years in research administration, and goals. Once matched, the two individuals are responsible for coordinating the collaboration that works best for them. We encourage a regular schedule of communication, whether meeting in person or connecting by e-mail or telephone – and certainly to get together at NCURA conferences! NCURA Region I Volunteer and Membership Committee members will check in periodically with both participants to gain feedback and to monitor the fit and success of their relationship.

Roles & Responsibilities

<u>Mentors</u>	<u>Mentees</u>
NCURA Region I seeks mentors who can provide advice, support and guidance and can also share their wealth of knowledge within the field of research administration/sponsored programs. Must have 5+ years experience in sponsored programs to participate.	NCURA Region I seek mentees who are looking for advice, support and guidance from an experienced professional in their field. Must have less than 5 years of sponsored programs experience to participate.
<p>A mentor, at a minimum, should be willing to:</p> <ul style="list-style-type: none"> • Meet/communicate with mentees on a regular schedule agreed upon by both parties. • Share relevant knowledge and experience. <p>In addition, a mentor can also volunteer to:</p> <ul style="list-style-type: none"> • Provide networking referrals and opportunities. • Assist or advise in other aspects of professional development. 	<p>A mentee should use this service to:</p> <ul style="list-style-type: none"> • Benefit from access to a NCURA Region I member with knowledge and experience in his/her fields of interest. • Explore professional networking and development opportunities. • Connect easily with a fellow NCURA Region I member and colleague. • Learn more about NCURA and how to get the most out of an NCURA membership.

The Relationship between the Mentor and Mentee

For a mentoring relationship to succeed, it must be voluntary, and both mentor and mentee must be proactive. An effective mentor/mentee relationship will build mutual respect, appreciation, and goodwill.

Qualities of a Good Mentor Include:	Qualities of a Good Mentee Include:
<ul style="list-style-type: none"> • Relevant knowledge and experience • Excellent interpersonal skills • Empathy for the learner and what the learner is trying to achieve • Enthusiasm for new energy and new ideas 	<ul style="list-style-type: none"> • Enthusiasm for learning and sharing • Openness to feedback and guidance • The desire to set and meet clear goals • Willingness to be proactive and to take ownership of professional development

How to Sign Up for NCURA Region I Mentoring Program

To participate in this distinctive program, please complete the application form located at <http://www.ncuraregion1.org/volunteer/mentorprogram.html> and email to: mentor@ncuraregion1.org

The program is set to start July 1st. Thank you!

PROCESS

Drawing Up the Partnership Agreement

Getting Started:

- Schedule an acquaintance interview
- Discuss educational backgrounds and experiences
- Discuss reasonable expectations

After sharing expectations and resolving differences in perspectives and goals, it's time for each party to develop a set of specific, initial objectives or plans for the relationship.

Both parties can ask for specific types of help such as:

- I have set the following personal development plans that I want to achieve in the next six months...
- I need to know more about...
- I want to strengthen the following skills...
- I think you need to know this about me...

Alternatively, the mentee may ask:

- What would be most helpful for me to know about Research Administration and/or NCURA?
- What regulations or standards are most important for me to learn first?
- What behaviors tend to be rewarded or discouraged in this profession?

The mentor, on the other hand, may develop questions such as:

- What are the most important things you would like to get from this relationship?
- Here is a list of things I believe I am particularly good at – are any of them of particular interest to you?
- What developmental needs, knowledge, skills, insights, etc., would be of greatest value to you?
- What is your preferred method of learning: listening, visual, hands-on, shadowing/observing, etc.?
- What can I do to increase the comfort level between us?
- What can each of us do to make sure we start off on the right track?
- Is there anything I need to know about you right now, such as your likes, dislikes, preferences, ways of doing things, etc., that would be helpful to me?
- Is there anything I can do to increase your comfort level with me?
- What else is important to you?

PROCESS

Productive Relationship and Logistics

PRODUCTIVE RELATIONSHIP

For a mentor-mentee relationship to be truly productive, both parties should agree to the following:

- Mutual respect
- Mistakes are expected as part of the growth process.
- Some expectations may go unmet.
- The goals must be mutual.
- The relationship must be based on a sense of mutual comfort and equality.
- The mentee typically takes some risks and shows initiative.
- The mentor's role is to help and support.
- People who are significantly different from one another can increase the potential for learning and skill development.

LOGISTICS

Some of the common logistical concerns that need to be addressed are:

- How often will we meet?
- How long will our meetings last?
- Where will we meet?
- On which weeks of the month will we meet, and on which days?
- Who will be responsible for setting up our meetings?
- What time will we meet: during lunch, before work, after work, or during work?
- How do we go about canceling a scheduled meeting, if necessary?
- What is the best way we can contact each other?
- What ideas do we have for getting our activities organized?
- How do we alter this agreement if it becomes necessary?
- How do we monitor progress?



NCURA Region I Mentor Program

Sample Goals and Objectives

Goal: to establish a positive relationship with a mentor in the field of research administration to gain knowledge and perspective.

Objectives:

To understand how a research administrative (grant) office is set-up, its priorities and basic functions.

To understand what policies are needed and what their priority of importance is.

To gain insight in how others cope with the various aspects of the profession.

To have help in creating a network of contacts that can provide insight and information.

To have someone who is willing to be a sounding board for research administration thoughts and ideas.

To have someone who will offer guidance and advice; tell me the truth, as they see it, and their point of view.

To have a resource for those panic moments to ask “Have you ever encountered this before?” – a sounding board.

To have a sharing of information on what’s new and changing.

To have someone who will help me remember to laugh at myself.

Timeline:

Spring 2011 Regional meeting: Recruit mentors for the program and continue through the summer. We propose putting fliers at the registration desk and hospitality suite. Also, we propose recruiting via word of mouth.

Summer 2011: We understand the website task force is proposing a website redesign. We propose working with the website task force and communications committee to develop an online application for our mentoring program.

Fall 2011: Announce the new mentoring program in September and pair up mentors/mentees before the annual meeting in Washington DC.

Priority 2: Brian Farmer and Marjorie Piechowski are putting together a presentation/talk for members to share with their home institutions to introduce the value of professional organizations and an understanding of research administration industry. This is scheduled to complete June 1 and we'll post this on the web as a resource.

Priority 3: The committee should stay active for the next year to see the initial mentoring project through roll-out, plus continue developing plans to address leadership and job-shadowing mentorship. We propose starting to work with the communications and volunteer committees over the next year, so we can roll the mentoring project into the appropriate committee and help this committee define a sustainability plan for the program.