

Research Mentor Training

The selections you have chosen for your customized curricula are drawn from materials based on *Entering Mentoring* (Pfund, Branchaw, and Handelsman, 2014).

The Entering Mentoring-based materials have been developed and tested by many partners across the country. Individual acknowledgements can be found in footers of each page.

A full listing of partners and funders can be found at CIMERProject.org.

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Work-life integration

1. Enhancing Work-Life Integration Full Module

Enhancing Work/Life Integration

(based on the *Entering Mentoring Series* format)

Introduction:

Addressing the complementary roles of work and family life as part of a more comprehensive view of a mentee's career development is often a feature of successful mentoring relationships. Work/life integration is a concern for both men and women. In its Statement of Principles on Family Responsibilities and Academic Work, the American Association of University Professors stated: "Transforming the academic workplace into one that supports family life requires substantial changes in policy and, more significantly, changes in academic culture." (1)

Considerable planning and foresight are required to manage the inevitable conflicts that exist for early career academics as they attempt to initiate a research-oriented career at the same time that many choose to begin a family. Even for those without children, managing work and other personal demands and responsibilities can be daunting. Mentors can play an important role in guiding and supporting their mentees through the early stages of a career and family life, but are often unsure of an effective method by which to address these issues with their mentees, or even if it is appropriate to do so.

This session will introduce mentors to a well-established program of materials, *Total Leadership* (www.totalleadership.org), designed to guide participants through a series of reflective exercises assessing the goals participants have for themselves in four domains of their life: 1) work, 2) family, 3) community, and 4) self. The exercises culminate with mentors conducting a small-scale "experiment" designed to make a small but meaningful change in their behavior that will achieve better integration of their goals across these four domains. Improved work/life integration skills on the part of mentors serve not only as an effective way to model desired behaviors for mentees, but also provides a practical experience from which mentors may feel more comfortable addressing issues related to work/life integration with their mentees.

Learning Objectives:

Mentors will have the knowledge and skills to:

- (1) Recognize the importance of all four domains of a mentee's life to their overall career satisfaction.
- (2) Utilize a structured process designed to initiate and support conversations between mentors and mentees on the challenges of achieving better work/life integration.
- (3) Identify for themselves and their mentees targeted areas for achieving better work/life integration.

(1) American Association of University Professors. Statement of Principles on Family Responsibilities and Academic Work. Draft endorsed June 2001. Available at <http://www.aaup.org/statements/REPORTS/re01fam.htm#7>

Curricular materials developed by Dennis Durbin, MD, MSCE and Emma Meagher, MD (2015). The Children's Hospital of Philadelphia Research Institute and the University of Pennsylvania Perelman School of Medicine.

Overview of Activities for Work/Life Integration Session

This module can be implemented as a single, 2-hour session or divided into two 1-hour sessions, depending on the time available and the overall schedule of the mentor training curriculum into which it is incorporated. Ideally, if implemented as part of a multi-session curriculum, approximately 15 minutes would be made available in additional sessions to provide time for small groups to meet together and discuss progress on experiments, as well as how best to share this program with mentees.

	Learning Objective	Core Activities
1.	Recognize the importance of all four domains of a mentee's life to their overall career satisfaction	Mentors share challenges they have had in discussing work/life issues with their mentees. (Activity #1) Mentors read and discuss Case #1: <i>Looking for Harmony</i> (Activity #2)
2.	Utilize a structured process designed to initiate and support conversations between mentors and mentees on the challenges of achieving better work/life integration	Review <i>Total Leadership</i> Program (Activity #3) Mentors complete a 4-way assessment and discuss results with members of their small group (Activity #4)
3.	Identify for themselves and their mentees targeted areas for achieving better work/life integration	Mentors brainstorm opportunities for behavior change experiments with members of their small group (Activity #5)

FACILITATION GUIDE

Recommended Session on Enhancing Work/Life Integration (120 minutes)

➤ Materials needed for the session

- Chalkboard, whiteboard or flip chart
- PDF or PowerPoint presentation entitled “Overview of Total Leadership Program” with accompanying presentation notes
- One facilitator copy of *Total Leadership: Be a Better Leader, Have a Richer Life* (Stewart Friedman, Harvard Business Press, 2008) for each participant. Books are available in paperback, audio and Kindle versions. Participants will need to purchase their own copies, prior to the session. Alternatively you may purchase books for participants if funds are available.
 - Ideally, participants will have read chapters 1-4 PRIOR to this session
- Handouts:
 - Copies of the introduction and learning objectives for Enhancing Work-Life Integration (page 1)

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- Copies of the case study, “Looking for Harmony” (page 6)
 - Copies of the Four-Way Assessment Table (page 7)
- **Introductions** (5 min)
- TELL: Review the introduction and learning objectives for the session
- **Objective 1: Recognize the importance of all four domains of a mentee’s life to their overall career satisfaction** (40 minutes)
- ACTIVITY #1: Large Group Discussion (15 min)
- DISCUSS: Invite participants to share personal stories of challenges they have had in initiating discussions about non-work considerations with their mentees, and reasons for any reluctance.
- ACTIVITY #2 (25 min): Case Study: Looking for Harmony
- READ: Distribute case study and ask a participant to read it aloud or let them read it individually for two or three minutes.
 - DISCUSS (22 min): Discuss the case with the entire group. You may want to record the ideas generated in this discussion on a white board or flip chart. Use the guiding questions following the case study.
- ❖ **Objective 2: Utilize a structured process designed to initiate and support conversations between mentors and mentees on the challenges of achieving better work/life integration. (45 min)**
- ACTIVITY 3: Introduction to *Total Leadership* (15 min)
- TELL: Introduce *Total Leadership* program using the PDF or the PowerPoint presentation. Speaker notes are included as a companion document.
 - **NOTE: If this module is being implemented in two 1-hour sessions, the material can be divided at this point.**
- ACTIVITY #4 (30 min): 4-way Assessment
- TELL: Have participants complete a 4- way assessment using the handout provided. Participants complete the table using the following instructions (10 min):
 - The first column (importance) allocates a theoretical 100% maximum of importance that each person assigns to each domain of their life. In other words, how would you rank the importance of each domain vis a vis the others so that they add up to 100%.
 - The Focus column represents how each person actually spends their waking time *and attention* in each domain. It is important to consider that even though

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a person might physically be in one location (e.g. at home), their attention might be elsewhere. This column should represent the allocation of *attention*.

- The Satisfaction Column is a self-assessment of how satisfied each person feels with each domain.
 - The Performance Column is a self-assessment of how well each person thinks he/she is doing in each domain, through a combination of reflecting on “how well do I think I’m doing,” as well as “how well would my stakeholders in each area say I’m doing.”
- DISCUSS (20 min): After each participant has completed his/her assessment, divide participants into small groups of 3 members each. Ask participants to discuss their assessments with members of their small group, soliciting feedback on their assessment. These small groups will serve as a “coaching trio” for the purposes of the experiments that will be designed by mentors to achieve better work/life integration.

❖ **Objective 3: Identify for themselves and their mentees targeted areas for improvement in achieving better work/life integration (30 min)**

➤ **ACTIVITY #5 (30 min): Choosing an Experiment**

- DISCUSS: In small groups developed above, have participants brainstorm with their “coaching trio” ideas for small-scale behavior change experiments to be conducted over the next 6- 8 weeks.
- NOTE: Guidance for the experiments can be found in chapters 6 and 7 of *Total Leadership*. These chapters should be read as soon after this session as possible to provide additional support for participants in sustaining their experiments. Examples of experiments from the book or personal experience can be provided by facilitators to kick-start the discussions.

❖ **On-going activities**

Participants should continue to meet in their small groups, either in person, via email or conference call, approximately once every two weeks for 8-12 weeks to provide feedback and coaching to one another on the progress of their experiments. Ideally, these meetings/discussions would take place over the time period of a comprehensive multi-session mentor training curriculum. Assignment to groups is typically random, unless there are members of the same division/ department or other research group who would have an easier time getting together because of a common work schedule. If a particular

small group does not develop a constructive dynamic, facilitators may need to re-assign participants among different groups.

Keep in mind that the purpose of having mentors conduct an experiment is two-fold: 1) it enables them to model specific behaviors and attitudes that they may want to foster in their mentees and 2) it provides them a practical experience with conducting an experiment so that they can serve as a more effective resource to their mentees when they attempt to do so as well.

Enhancing Work-Life Integration

Case #1: Looking for Harmony

Dr. Feinstein is a 32-year-old Assistant Professor on the tenure track who joined the faculty one year ago at the time she received a NIH Career Development Award. Dr. Feinstein is expecting her first child this year and would like to request a three-month maternity leave, and consider returning to work in a part-time capacity. However, Dr. Feinstein has not raised this issue with her mentor, a 60-year-old Professor, whom she senses is already growing frustrated that she does not put in the number of hours that his generation did. Dr. Feinstein has heard that a newly hired assistant professor is a real “go-getter” working 70-80 hours a week, and she fears this new mentee will make her look as if she is less serious about her research career.

Guiding Questions for Discussion:

1. What are the main themes raised in this case study?
2. How can the concept of workforce flexibility be translated for faculty in clinical and behavioral research?
3. As a mentor how do you address generational differences (with respect to work ethic, work-life integration, or other areas) that arise with your younger mentees?
4. How do differences in mentor/mentee gender affect these discussions?

The four-way view

Assess importance, focus, satisfaction and performance in each domain

	Importance	Focus	Satisfaction 1=not at all ...10=fully	Performance 1=poor ...10=excellent
Work / Career	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Home / Family	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Community / Society	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Self: Mind, Body, Spirit	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Overall	100 %	100 %	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10

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Discussion questions:

1. What is the biggest or most compelling disconnect between the importance of a domain and the percentage of your time you spend in it?
2. Are there obvious places where you might work harder to bring a domain of life into more consistency with your core values?
3. Think back to the core values you expressed earlier. Are there some core values that are not getting expressed well in all domains of your life? Are there some domains of life where you are able to express many of your core values?

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Facilitator Notes for Powerpoint Presentation on *Total Leadership Program*

Slide 1, Title Slide

Review website for additional information on program. This program was developed by Stewart Friedman, a professor at the Wharton Business School at the University of Pennsylvania and founding director of the Wharton Work/Life Integration Project (www.worklife.wharton.upenn.edu). It reflects a compilation of experience and expertise gained by Dr. Friedman over several decades of research and teaching undergraduate and graduate courses in leadership development – and recently in a MOOC on Coursera, in which over 57,000 people enrolled – as well as providing consultation and training to many organizations and government agencies.

Elements of the *Total Leadership* program were adapted by Dennis Durbin, MD and Emma Meagher, MD at the University of Pennsylvania School of Medicine (Penn) for incorporation into the mentor training curriculum for clinical and behavioral researchers, and refined after pilot implementation and evaluation with faculty research mentors at Penn.

Slide 2, Not work/life “balance” but “integration”

While the term “work/life balance” is more commonly used in discussions and written materials on this topic, this often implies an assumed tension between work and family life: as you devote more time and attention to one, you must necessarily devote less to the other. This places work and family life into conflict with one another, rather than approaching work as an element of a complete life that includes family, community and attention to one’s own physical, emotional and spiritual life. The series of exercises that we will use from the *Total Leadership* program are meant to intentionally assess the goals that you have in each domain of your life, and to identify concrete actions you can take that will better align these goals, rather than pit them against one another.

While there will inevitably be times when you must decide, for example, to either attend a conference out of town or spend more time with your family, by being more intentional about the goals you are trying to achieve in all domains of your life and the value you place on each of them, the individual decisions you make each day as to how to spend your time and allocate your attention will feel less like a conflict between these domains and more like an integrated system.

Slide 3, The Program

The Total Leadership program consists of three basic components, each with a specific purpose:

1. **Be Real:** act with authenticity by clarifying what’s important
Often, we feel stressed at work because we find ourselves involved in many activities that we would rather not be doing, and not involved in the things that we find more important or interesting. This often results from our failing to define what is most important to us and the specific goals we have for ourselves in the four domains of our lives. Through a series of reflective exercises, participants will help articulate a personal vision statement for themselves, as well as clarify the specific

goals they have for the four domains of their lives, their current success in achieving these goals, and opportunities for improvement.

2. **Be Whole:** act with integrity by respecting all your people

While we will not focus specifically on this aspect of the *Total Leadership* program during the mentor training, this part of the program enables you to clarify who the various people are that impact the work (e.g., department head, mentees, colleagues), family (e.g., spouse, children, parents) and community (highly variable and defined differently by each individual, e.g., friends, school community, sports leagues) domains of your lives, and to assess the expectations these people have for you. This is an important step in clarifying the goals you have in each domain and what it might take to achieve these goals to the satisfaction of those impacted by your actions. While we will not specifically cover this part of the program, you are encouraged to read chapters four and five in the book and conduct stakeholder interviews as described.

3. **Be innovative:** act with creativity by experimenting

Once you have clarified what is important to you, the goals you have in each domain of your life, and the opportunities you have identified for improving integration of these goals across domains, you will design an “experiment” - a small-scale change in your behavior that is designed to bring better alignment of the goals you have in all four domains. You will be divided into groups of 3 and work together to design your individual experiment and then over time, serve as a coach to one another providing feedback, advice and guidance on the progress of each other’s experiments.

Slide 4, Your Leadership Vision

Achieving better integration of your work and personal lives (and assisting a mentee in doing the same) begins with a clear articulation of what is most important to you and what goals you are trying to achieve in the various domains of your (your mentee’s) life. An effective way of articulating this is to write a personal vision statement that succinctly and compellingly summarizes where you would like to be in 15 years: where are you living, with whom, where are you working, doing what, what else is going on in your life, etc.? A personal vision statement can serve as a blueprint for determining how you will ensure that you spend your time in activities that are important to you.

Slide 5, The four-way view

Achieving greater integration in the four domains of your life, and ensuring that you optimally spend your time pursuing these goals requires an intentional effort to specify each of the goals and assess your current satisfaction and performance with how you are achieving them. You will be guided through an exercise during which you will assess the current state of integration of these four domains, where you are being more (or less) successful in achieving the goals you have set for yourself, and identifying opportunities for improving the alignment of various domains of your life.

Slide 6, Experiments: Innovative actions to produce four-way wins

The readings and reflective exercises in *Total Leadership* culminate in you designing a specific experiment- a concrete, implementable action or change in your behavior that

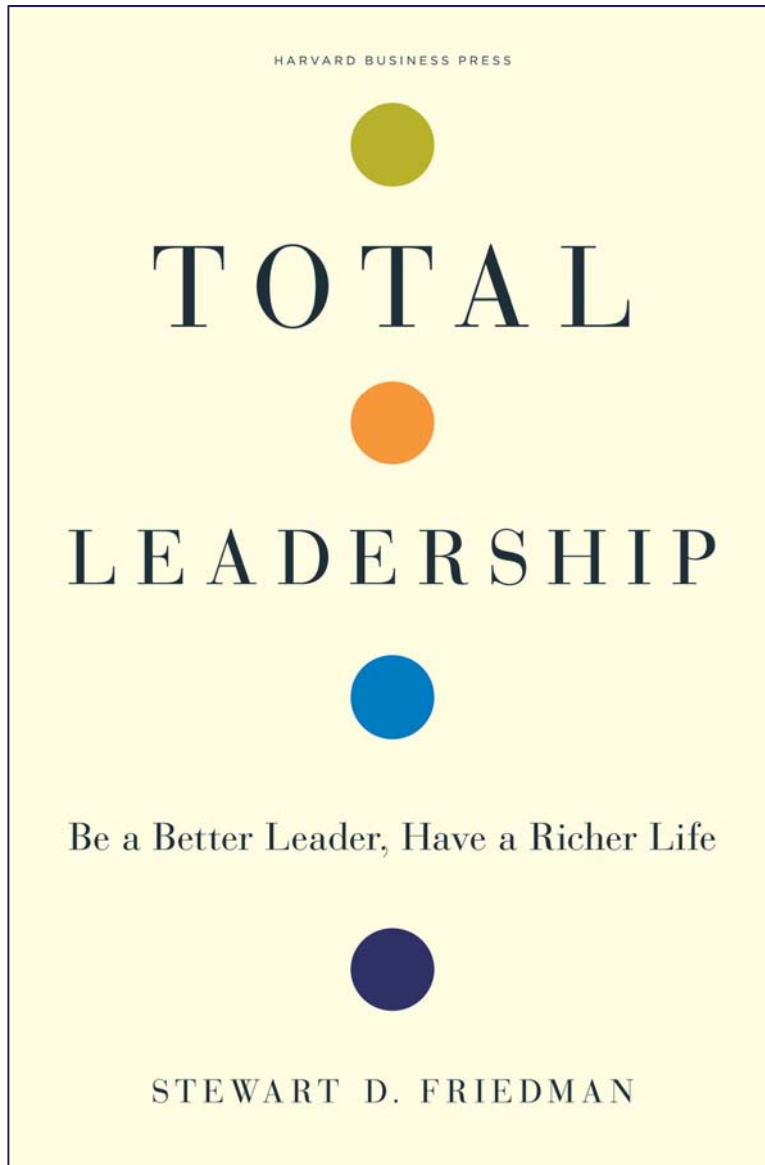
directly or indirectly impacts all four domains. Chapter 6 in the book contains examples of different kinds of experiments that participants have designed, depending on the nature of the discordance identified during the four-way assessment. When designing your experiment, “think small.” Successful experiments often involve “small wins” which are easy to implement and sustain, and yet can have significant impact on your sense of satisfaction and performance in every domain.

Slide 7, Coaching one another

As mentioned previously, you will be divided into small groups of 3 that will serve as a “coaching trio,” offering advice and guidance to one another. During the session, these small groups will provide feedback on the four-way assessments each of you perform, as well as brainstorming help in designing your experiment. Over time and with regular “off-line” meetings, the groups will help hold you accountable to the goals of your experiment, help you assess your progress, and assist you if you are struggling to implement your experiment.

Slide 8, Results

Past experience with participants in *Total Leadership* has found that participants often identify significant discordance in the way they *actually* allocate their time and attention to the four domains of their life vs. the way they would *prefer* to allocate their attention. This often leads to less than ideal assessments of performance and satisfaction in each domain. Participants in Total Leadership do not typically alter their sense of the importance they assign to each domain of their lives, but they are able to better allocate their time and attention to be closer to their ideal, and to improve their satisfaction and performance in every domain (often despite allocating less time and attention to it!).



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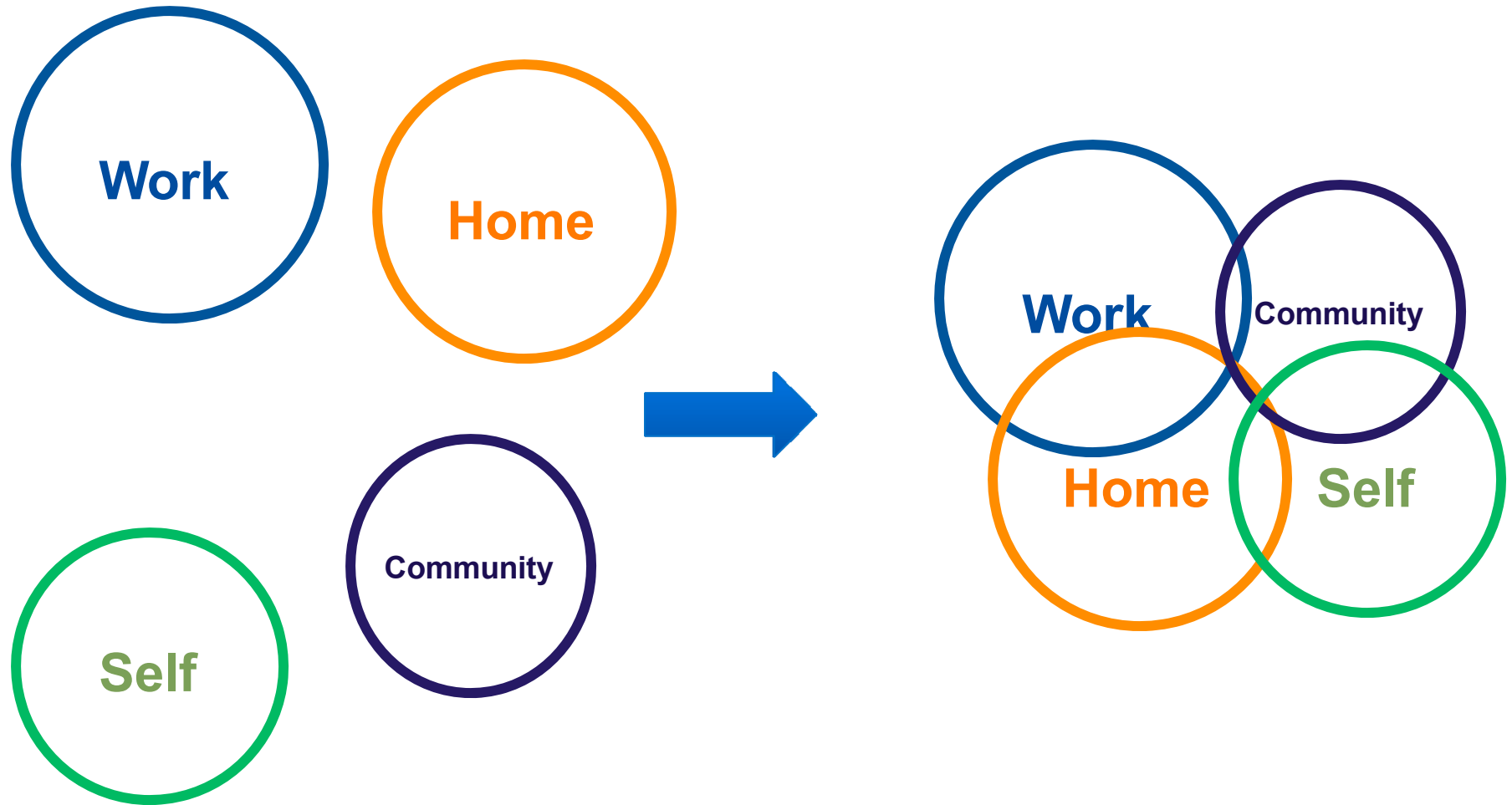
Mentor Training

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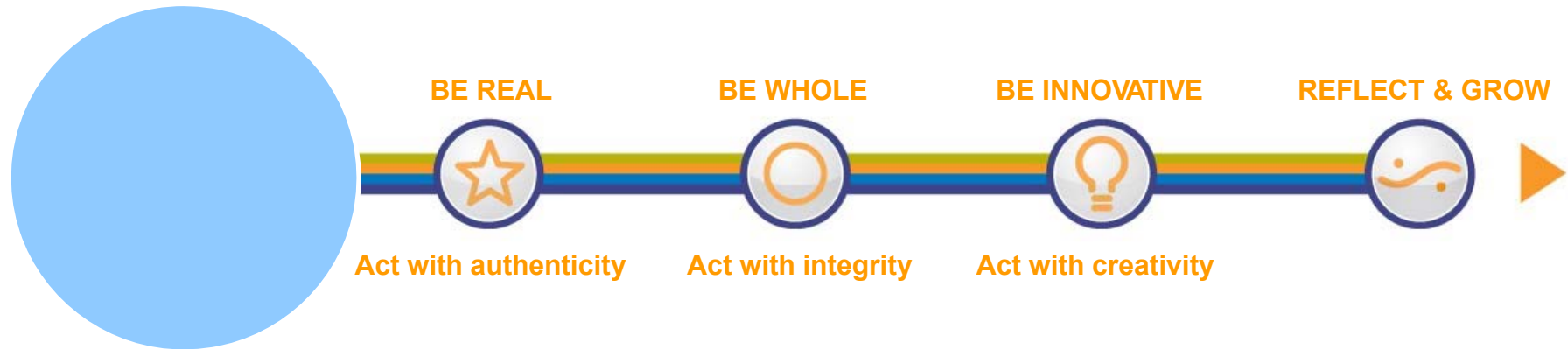
Not work/life “balance” but “integration”

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The Program



Be real: act with authenticity by clarifying what's important

- Personal vision statement
- Conduct a 4-way assessment

Be whole: act with integrity by respecting all your people

- Conduct interviews with key people in your life

Be innovative: act with creativity by experimenting

- Design and conduct an experiment
- Create small group of colleagues to provide coaching and support



Your leadership vision

A compelling image of an achievable future

- Provides direction and guides action
- Offers stability in uncertainty by focusing attention
- Generates enthusiasm and commitment
- Rooted in past, focused on present and future
- Passionate, hopeful and inclusive
- Personally meaningful to your life as a whole



The four-way view

Assess importance, focus, satisfaction and performance in each domain

	Importance	Focus	Satisfaction 1=not at all ...10=fully	Performance 1=poor ...10=excellent
Work / Career	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Home / Family	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Community / Society	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Self: Mind, Body, Spirit	%	%	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10
Overall	100 %	100 %	1 2 3 4 5 6 7 8 9 10	1 2 3 4 5 6 7 8 9 10



Experiments: Innovative actions to produce four-way wins

- Concrete, implementable, important step toward vision
- Impacts (directly or indirectly) all 4 domains
- “Small wins”
- Find new ways of creating mutual value among domains





Coaching one another



- Create 3- person groups for coaching, support and accountability
- Meet regularly (in-person or email/ phone) to
 - provide updates
 - seek advice and guidance



Results: recent findings (N>300)

	Importance (%)		Attention (%)		Δ Satisfaction (%) Pre to Post	Δ Performance (%) Pre to Post
	Pre	Post	Pre	Post		
Work / Career	34	32	56	44	21	8
Home / Family	34	34	23	28	27	14
Community / Society	12	14	7	11	31	11
Self: mind, body, spirit	20	20	14	17	39	22
	What's important doesn't change much over four months.		But focus of time and energy shifts from Work to other domains...		...as satisfaction increases in all domains, especially Self...	...and performance increases in all domains, too.