



Mentoring Manual

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1. Introduction

Affectus P/L Mentoring Package provides information and tools for people commencing or who are involved in a mentoring relationship. It has been developed to:

- Inform the community, mentors and mentees about mentoring and it's methods
- Build skills and knowledge in mentoring
- Increase the mentoring activity throughout the community by supporting the mentoring process; and
- Give confidence to those who are embarking on the mentoring journey.

Who will find the guide useful?

The guide has been designed for, but not limited to, individuals involved in mentoring activities throughout our communities.

How can the guide be used and adapted?

The guide has been designed as a self-learning process. It can also be used by people generally interested in mentoring and those attending mentoring learning activities.

It is envisaged that the mentoring package will encourage and enable mentors and mentees to form and enhance their new and existing mentoring relationships.

2. Mentoring – Brief Concepts

Mentors

Expectations for mentors are as follows:

- Registration of mentors (see registration form on p21)
- Read through the mentoring pack and develop a mentoring meeting plan using p23
- Read through the mentoring pack and develop answers to questions outlined.
- Take a lead role in the initial relationship building phase
- Commit to the mentee.

Mentees

Expectations of mentees are as follows:

- Registration for the program using the mentoring form (p21)
- Read through the mentoring pack and develop answers to questions outlined
- Take the lead role in initiating the mentor/mentee relationship through personal contact with one of the mentors in the database or a mentor of choice
- Take the lead role in securing the mentor and establishing a relationship with mentor
- Commit to a communication process
- Commit to a mentee “change plan” (see p32).

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3. Aim

To assist in developing community and personal capability through a supported and resourced mentoring process.

4. Assumptions

- That the people involved in the mentoring relationships have come freely to the opportunity
- That the relationship guidelines between mentor and mentee will be considered, discussed and agreed between these two individuals
- That generosity will be the guiding principle for mentoring between the mentor and mentee

5. Definition of Mentoring

Mentoring is a planned pairing of a more experienced person with a lesser skilled individual for the purpose of achieving mutually agreed outcomes. It is a partnership in which both individuals share in a growth process and the personal development of one another.

6. History of Mentoring

Mentoring began in ancient Greek methodology. Around 1200 B.C. Odysseus was leaving for the siege of Troy when he appointed his friend, Mentor, to be a surrogate father to his son, Telemachus. Historical records show that skills, culture and values in preparation for manhood were learned in this paired relationship.

Craft guilds founded in the Middle Ages also show examples of mentoring. Young people were apprenticed to master craftspeople working in specific professions such as merchandising, law or gold smithing. These apprenticeships were forerunners to the employer/employee relationship models found in industrial society.

The term mentoring has been used since these times to describe a relationship where an individual receives advice and/or coaching from a more senior wise counsel. For the mentor, it is an opportunity to develop as an individual both personally and professionally; for the mentee, it is an opportunity to learn from a more sage person. Typically, these relationships last several years and often end in friendships.

Over the years, informal mentoring relationships have advanced careers and guided skill building through a profession or organisation. As societies become more complex and impersonal, the need for person-to-person mentoring has become even more important. People must develop skills to succeed in today's complex and rapidly changing world. As a result, mentoring assumes an emphasis beyond the standard employer/employee relationship.

7. Why Mentor?

Research results show that people who have been mentored report greater satisfaction and career success than non-mentored individuals. Two-thirds of top corporate officers interviewed for one study reported having had at least one mentor who significantly helped them in their careers. Of twenty-five successful women executives interviewed in a different study, all were found to have had at least one mentor as well (Knox and McGovern, 1988).

8. Benefits of Mentoring

Benefits to Mentors:

- Personal satisfaction from fostering the professional development of a mentee
- The gratification of passing a legacy to the next generation of individuals and/or organisations
- Development of new professional contacts
- Exposure to new ideas, technologies, perspectives through interaction with mentees
- Improvement of coaching and counselling skills
- Enhanced reputation
- Sense of accomplishment
- Personal growth
- Increased knowledge and experiences
- Broadened perspective
- Job enrichment.

Benefits to Mentees:

- Acquisition of new technical, interpersonal or management skills
- Professional development
- Increased personal confidence
- Key information on the culture and inner workings of the community
- Development of a relationship with a person who can be a role model and sounding board to give feedback on ideas and plans
- Development of new contacts and networks
- Exposure to new ideas, technologies and perspectives
- Increased performance.

Benefits to the community:

- Increased human capacity
- Effective communication of the history, culture, mission and goals of sectors within, or the whole of, the community
- Improvement of coaching and counselling skills
- Increased interaction among individuals across functions and levels of the community to:
 - Generate new ideas and skills
 - Maximize new knowledge areas, perspectives and ideas
- Increased communication and understanding
- Bridging the barriers between sectors of the community
- Stronger networks.

9. A Mentoring Relationship

9.1 Mentor

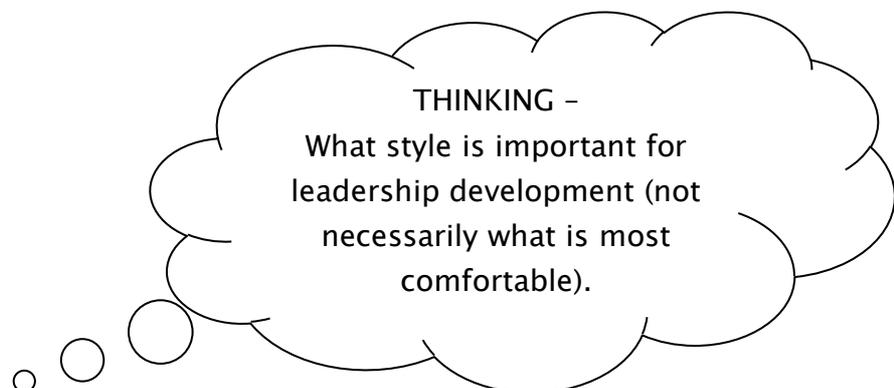
A mentor may undertake the following roles:

- A feedback provider
- A sounding board
- An interpreter
- A role model
- A dialogue partner
- A counsellor
- A cheerleader.



A mentor is always someone who is helping you achieve your potential. Therefore a mentor could also be the following:

- An Assessor
(What did you get from your actions?
You can increase the outcomes by...)
- A Challenger
(Why did you decide that?
Is there another way?)
- A Supporter
(Well done - did you use all of your resources?
What can I do to increase your profile through this success?)



What is my mentoring relationship role?

Element	Role	Function
Assessment	Feedback Provider	Ongoing feedback as mentee works to learn and improve
	Sounding Board	Evaluation of strategies before they are implemented
	Comparison Point	Standards for evaluating own level of skill or performance
	Feedback Interpreter	Assistance in integrating or making sense of feedback from others
Challenge	Dialogue Partner	Perspectives or points of view different from mentee
	Assignment Broker	Access to challenging assignments (new jobs or additions to current roles)
	Accountant	Pressure to deliver commitment to developing goals
	Role Model	Examples of high (or low) competence in areas being developed
Support	Counselor	Examination of what is making learning and development difficult
	Cheerleader	Boost in mentee belief that success is possible
	Reinforcer	Formal rewards for progress towards goals
	Companion	Sense that mentee is not alone in struggles and that mentee can achieve goals

McCauley and Velcro, Handbook of Leadership Development, 2004, Jossey-Bass, San Francisco.

Critical mentoring skills include:

- Being a good listener and knowing how to give effective feedback
- Knowing how to help with goal setting and planning
- Knowing when to give and when not to give advice
- Having the ability to instil confidence and motivate people.

A successful mentor:

- Values the community and its work
- Cares about others and treats everyone with respect
- Is tolerant, non-judgmental and accepts personal differences
- Is confident and secure with self
- Is able to establish a comfortable environment for discussions
- Enjoys watching a mentee develop
- Demonstrates sensitivity to a mentees needs; and
- Trusts others and can be trusted.

Personal characteristics of a successful mentor:

Committed Trustworthy Shared decision-making Empathy for others Open communication style Enjoyment of people

9.2 Mentee

Consider the above opportunities for the mentor to shape what he/she will provide and decide what you personally require to achieve your outcomes and ensure that this is enacted during the relationship.

Also think about...

A good mentee:

- Is eager to learn and open to new ideas
- Is willing to take risks
- Has a positive attitude
- Is open to receiving feedback about skills and behaviour
- Is able to integrate feedback and act on it; and
- Takes initiative and demonstrates resourcefulness.

Tips for mentees:

1. Ask for help on a specific project, committee or task force and ask for specific information
2. Take initiative. Ask for advice and feedback and let others know your interests and skills as well as what you are working on
3. Produce high quality work
4. Show great ambition and enthusiasm on the job
5. Put in extra time
6. Show loyalty and trustworthiness toward your mentor
7. Discuss with your mentor alternative strategies or perspectives for a project or idea
8. Think ahead of time what questions you would like to ask
9. Follow up. Meet regularly with your mentor and let them know about the progress of the project or ideas you had discussed earlier with them.

10. How a Mentoring Relationship Works

10.1 Beginning the relationship

Step 1.

It is suggested that both the mentor and mentee consider key questions similar to those found as part of the mentoring registration form.

Mentor:

1. Why do you believe you were chosen to be this person's mentor?
2. What can you provide in this relationship?
3. What do you assume will be your roles and responsibilities?
4. How were you approached? Was it an appropriate first contact?
5. How often can you meet? Where and for how long?
6. What do you hope will be achieved?

Mentee:

1. Why did you choose this person?
2. What will this person provide?
3. What will be your roles and responsibilities?
4. How did you approach this person?
5. How often will you meet? Where and for how long?
6. What do you hope to achieve?
7. What will you be able to provide the mentor?

Step 2.

Start with an initial conversation, via any medium that is most convenient for both mentor and mentee.

At this meeting the following should be decided and completed:

- Roles and responsibilities – mentor and mentee
- Confidentiality and privacy – mentor and mentee
- Arrangements for future contacts between mentor and mentee
- Level of commitment expected (time, energy, flexibility)
- Boundaries and limitations for the mentor's contact with the mentee
- Anticipated outcomes for the mentee and mentor
- Closing the mentoring relationship.

11. Success Factors - Mentoring Relationships

1. Both mentor and mentee are open to change, willing to explore possibilities, and are willing to help and learn from each other
2. Both make a commitment to advancing the professional development of the mentee
3. The relationship is a healthy one from which both individuals gain personal and professional satisfaction
4. Both are capable of confronting and constructively resolving conflicts
5. Mentees recognise the mentor's effect on their professional development
6. The relationship evolves and changes with time as the needs and goals of the mentor and mentee change, and may end when it suits the needs of the pair.

What should be avoided?

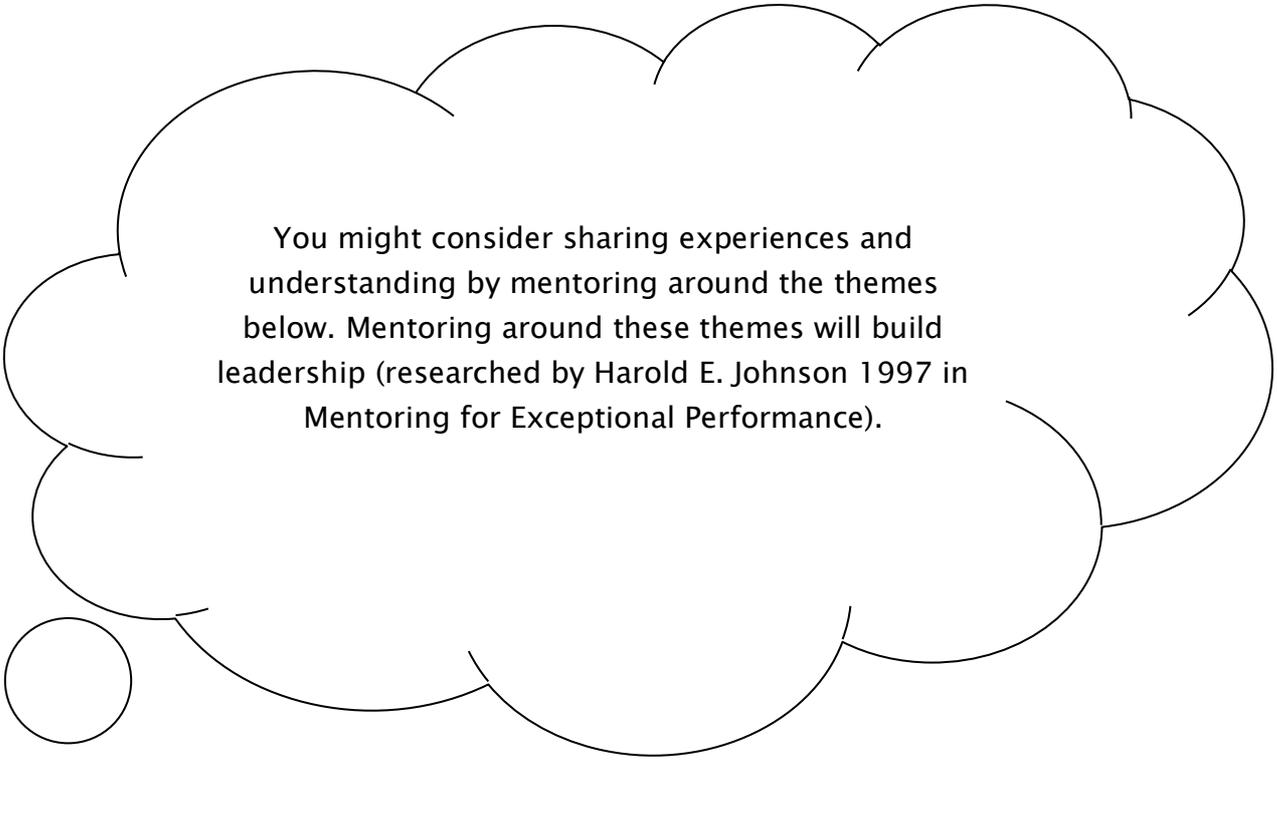
- A one-time meeting event
- A replacement for supervisory feedback, counselling or coaching
- Psychological or psychiatric advise
- Formal career advise.

12. Developing the mentoring relationship further

"The energy my mentee brings to discussions helps me to re-energise and think broadly. This relationship is a building of ideas and not just me giving him my ideas."

— Mentor – USQ Mentoring Program

- The Mentor's role is to assist by imparting expertise and practical experience to the Mentee. Mentors can provide knowledge, an in-depth understanding of organisational culture, politics, networking and protocol.
- Mentors are not required to provide all the answers; instead the Mentor encourages the Mentee to use their available resources to identify solutions. It is a collaborative partnership. It is about building ideas not just simply giving answers.
- Mentors can help alleviate mentee apprehension regarding the mentor's time availability by periodically connecting in an unplanned fashion e.g. emails which reinforces that you are available to assist.
- Mentoring is effective when the mentee's goals and objectives are established clearly from the beginning. Establishing clear outcomes will assist both parties in maximising the potential benefits that may develop from the mentoring relationship.



You might consider sharing experiences and understanding by mentoring around the themes below. Mentoring around these themes will build leadership (researched by Harold E. Johnson 1997 in Mentoring for Exceptional Performance).

- *Achievement*—Knowledge is an essential ingredient for self-reliance and personal competence and both are prerequisites for achievement.

What knowledge can you share with the mentee?

- *Pragmatism*—A realistic and common-sense approach and noticing and seizing opportunities.

What is your experience of pragmatism?

- *Focus*—An intense commitment to provide exceptional outcomes and understanding all the people involved in achieving the outcome.

How have you seen focus assist in achieving goals?

- *Commitment*— Maintaining allegiance to a vision, a goal or objective.

What personal stories can you share regarding commitment?

- *Optimism*—Seeing possibilities and transforming difficult situations into opportunities and learning.

Choose one of the hundreds of community stories and share it.

- *Responsibility*—Accepting responsibility is the first step and it can't be delegated.

A story of “stopping the buck ” is essential for a mentee.

- *Humility*—Readily acknowledging that one doesn't have all or most of the answers provides an invitation for participation.

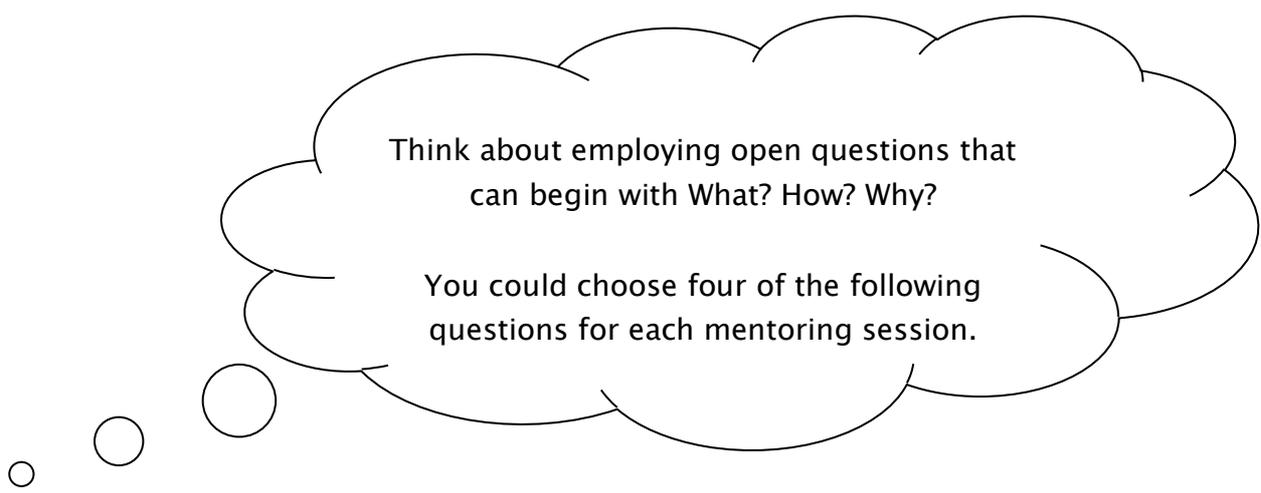
Talk about teams, sharing roles and accepting accolades.

Some conceptual questions that must be considered by the mentor:

- What is the mission for the mentee?
- What is it that the mentee wants from me?
- What skills do I need to make sure I am employing when we meet? Listening? Questioning? Confirming? Encouraging?
- What information must I share each meeting?
- What information must I extract from each meeting?
- How can I make sure it is an enjoyable process?

Building the Rapport:

- How am I establishing an effective relationship?
- Does my mentee know when I am contactable and how often?
- Is the environment suitable for the mentee to be able to ask difficult questions?
- How can I maintain honesty and openness but also ensure that I am not impacting on the trust we have built?
- How can we build a system of confidentiality? And how might we maintain this?



Think about employing open questions that can begin with What? How? Why?

You could choose four of the following questions for each mentoring session.

Interactive Communication

Questioning that will assist – here are some ways of questioning that might further enhance the relationship and outcomes:

- How do you feel about your present performance?
- What are the ways you feel this should be handled?
- Why do you feel this has been happening so frequently and for so long?
- What do you think about it?
- What other objectives do you think you should be pursuing at this time?
- What do you feel is most important right now in terms of your leadership strategy?
- What do you like least about your present situation?
- Who else is involved in that problem?
- How important is that solution to you?
- What do you think would happen if you implemented another solution? What are some other solutions?
- What are the implications if this situation continues?
- What are the behaviours you want to see?
- What are the outcomes and how will you know they have been achieved?
- Why do you feel that this is the best approach?
- What do you feel are the least effective/most effective ways of accomplishing the next step in the strategy?
- How do you feel this situation came about?
- What do you like least/most about the way this problem has been handled to date?
- What is your opinion?
- How many other people do you feel are in a similar situation?
- What is your opinion on how this can best be handled?
- How do you feel the problem should be approached?
- Can you give me an example of what you mean by that?
- Then what?
- Would you please elaborate on that point?
- Can you tell me more about it?
- Do you recall what other types of problems you were confronted with in that situation?
- What other things do you like to do in your spare time?
- How important is that to you?
- Does that make sense to you?
- Do you think you can live with that?
- How would you like to proceed with this?
- What action would you like to take?
- What do you see is the next step in the decision process?
- How should you come to closure on this situation?
- What's the next move?

13. Managing Difference of Opinion

IF things become challenging for the mentee, communication is the basis for coming to resolution. Below are some concepts to consider when dealing with difference:



Four Communication Categories:

1. **Passive:** characterised by a desire to avoid offending people at all costs
2. **Aggressive:** characterised by pushing people around, loudly demanding what you want
3. **Passive-aggressive:** the long-suffering passive person will build up aggressions that will be triggered and a vicious outburst will precipitate
4. **Assertive:** characterised by the belief that everyone has the right to express his or her own legitimate needs.

Managing a Difference (of opinion) through Assertive Communication

Four F's of assertive messages:

Focus
Feelings
Facts
Fair requests

An assertive statement:

1. **Focus** the conversation on one specific concept
2. Acknowledge your honest reaction, your personal **feelings**
3. Present **facts** as you perceive them, without making judgments
4. Encompass a final and **Fair Request**, basically outlining what you want (making only one request at a time).

14. Achieving Specific Outcomes

To assist in achieving great outcomes for the mentee the table below will assist in maintaining focus.

Focus	Activity Descriptor
Leadership Development	The mentee may have written a commitment of self-development – to encourage the participant to deliver on their commitments.
Communication	Communication is the fundamental skill for leadership therefore how is communication being personally managed by the mentee to continue his/her leadership journey?

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16. Resources

Mentoring: How to Develop Successful Mentor Behaviours

Shea, Gordon F. (Author)

Publisher: Course Technology Crisp

Released: 2001

Practical and useful information as well as work sheets and some interesting stories of mentoring experiences

Coaching, Counselling and Mentoring: How to Choose and Use the Right Technique to Boost Employee Performance (2nd Edition)

Stone, Florence M. (Author)

Publisher: AMACOM

Released: 2007

An interesting text and has some descriptive information about how to actually talk across the miles and how to finish a mentoring relationship. More recent and a little more work based in context.

Mentoring in Action: A Practical Guide, (2nd Edition)

Meggison, David (Author)

Publisher: Kogan

Released: 2007

A practical book and also provides some interesting information and feels current with e-mentoring mentioned.

Mentoring

Affectus P/L. developed these mentoring materials to provide individuals – mentor and mentee alike - with an opportunity to form informed mentoring relationships. We extend you an invitation to become a mentor or mentee.

Mentor/Mentee Registration Sheet

It is anticipated that in completing this form you understand the following:

- The mentor/mentee relationship will be for a minimum of twelve (12) months
- That a regular contact process is essential for the relationship to be successful – a minimum of six contacts over the 12 months is suggested
- That contact can be via any method that is suitable but it must be appropriate for mentor and mentee and;
- That mentor/mentee resource materials will be considered.

FURTHER INFORMATION WILL BE PROVIDED WHEN THE RELATIONSHIPS HAVE FORMED.

PLEASE RETURN THIS SHEET TO:

Jill Briggs – Mentoring Manager –
via email at jill@affectusaus.com.au

via Post
Jill Briggs
Affectus
1095 Kings Rd
Norong, 3682, Victoria

16.1 Registration Sheet

Please complete the following:

Mentee Name:					
Postal Address:					
Email:					
Phone:		Mobile:		Fax:	
Mentor Name:					
Postal Address:					
Email:					
Phone:		Mobile:		Fax:	

1. Outline the personal reasons for wanting to participate in this mentoring?
2. Outline the reasons you have for your business/organisation involvement in mentoring?
3. What outcomes would you expect from a mentoring relationship?
4. What are your career goals for the next 5 years?
5. What skills do you bring to the mentoring relationship?
6. What knowledge do you bring?
7. Provide three (3) BRIEF career highlights
8. What is your greatest achievement?
9. What are you passionate about?

16.3 Meeting Schedule – Concepts to Follow

Date/ Location/ Time	Discussion Topics	Potential Process and Key Questions
Week 1	Mentoring Introduction	<p>This meeting is instigated by the mentee. Read through <i>Benefits of Mentoring</i> and <i>A Mentoring Relationship</i> (p 8 – 11) sections of this guide</p> <p>Mentee to collect all information required to commence the relationship including:</p> <ul style="list-style-type: none"> • Why you have chosen the mentor? • What role will be most useful (p 10)? • How and where you might meet? • How often you might meet? • How long will the meetings last for? • What will be discussed during the first meeting • Decide who will send out a meeting agenda for the first meeting • Completing the mentoring registration form (p 25). <p>Read through p 12 & 13 and p 29 for further information.</p>
Week 5	Initial Mentoring Meeting	<p>Prior to the meeting read through <i>Develop the Mentoring Relationship Further</i> (p 14 – 17) and <i>Enhancing the Mentoring Relationship</i> (p 36 – 39) sections of this guide.</p> <p>Set an agenda including starting time and topics to be discussed. <i>Mentoring Meeting Information</i> (p 29 onwards) section of this guide.</p> <p>Managing the meeting might include key questions that could be asked such as those found on p 13-16.</p> <p>Record the outcomes and decisions from the meeting (see p 34 of this guide). It is advised that the mentee commences a Mentee “Change Plan” such as the plan on p 35 of this guide.</p>
Week 9	Building the Mentoring	<p>Prior to the meeting read through p 18 & 19 of this guide.</p> <p>Set an agenda and ensure that both mentor and mentee have a chance to input into the agenda (see agenda template on p 34).</p> <p>As the mentoring meetings progress it is essential that the conversation builds on the initial thoughts and the mentee “change plan”.</p>

Week 17	Building on the “Change Plan”.	<p>Prior to this meeting it will be valuable to read through “Enhance the Mentoring Relationship” on p 36 of this guide.</p> <p>Set an agenda and ensure that both mentor and mentee have a chance to input into the agenda (see agenda template on p 34 of this guide).</p> <p>Commence this meeting by reviewing how the mentoring relationship is progressing through asking the following questions:</p> <ul style="list-style-type: none"> • Are we happy with mentor and mentee? • Are we pleased with our meeting medium? • Is the length of time and frequency appropriate? • What can we do that will ensure greater successes for the relationship and the mentee? <p>The second element of the meeting is to discuss the “change plan”.</p>
Week 25		To ensure that Week 25 and Week 33 are functional and effective ensure that an agenda is set, that the “Change Plan” is discussed and that the relationship is reviewed.
Week 33		To ensure that Week 25 and Week 33 are functional and effective ensure that an agenda is set, that the “Change Plan” is discussed and that the relationship is reviewed.
Week 41		<p>During this meeting follow Week 25 and 33 concepts above.</p> <p>One further concept that should be added as a meeting item is moving beyond the formal mentoring relationship (this step may happen earlier). Read through the “<i>An Evolving Mentoring Relationship</i>” on p 39 of this guide.</p>
Week 49		<p>Potentially this will be the final mentoring meeting, it is encouraged that this meeting be spent discussing the relationship and successes, change plans and successes and how to redefine the relationship between the mentor and mentee. Review the information <i>Coming to Closing</i> (p 42) section of this guide.</p> <p>Ensure that a meeting agenda is set and that an opportunity is provided for thanks and goodbye.</p>

16.4 Content for First Formal Mentoring Meeting

During this meeting the four topics below should be covered. The following is a guide of specific topics that could be discussed by both mentor and mentee.

TOPIC 1 - Establishing Mentoring Knowledge

- Job/Role/Career
- Future Aspirations
- Passions and interests
- Last holiday destination
- Community in which you work

TOPIC 2 - Establishing Mentoring Protocol

- Confidentiality – what must stay in the relationship and what can be shared beyond?
- Boundaries - how to communicate and when
- Reviewing the relationship – set a date
- Areas to be discussed and “no go zones”

TOPIC 3 - Identifying Mentees Needs

- Areas requiring mentoring
- Specifics regarding the two most important mentees needs
- Outline how the mentor will assist – minimum of three ways to assist in the two most important needs identified by the mentee.

TOPIC 4 - Confirming Next Meeting

- Confirmation of time and date
- Outline of areas of discussion including:
 - Establishing Knowledge
 - Reviewing Protocol
 - Mentee Needs
 - Mentor Needs

The FIRST FORMAL MENTORING MEETING – Detailed Questioning

KEY QUESTIONING TOPIC 1 - Establishing Mentoring Knowledge

The purpose of this topic is to establish understanding and trust upon which strong mentoring relationships are built.

Initial Icebreaker - questions for the mentor to consider and/or ask.

- What do you do?
- Do you enjoy what you do?

Developing Mentor/Mentee Knowledge - questions for the mentor to consider and/or ask.

- What are your roles and responsibilities in the community?
- Let me tell you a little about my roles and responsibilities

- Where do you see yourself in 10 years time?
- This is where I see myself by 2025?

- What are your passions and interests outside of your roles and responsibilities?
- These are my three greatest passions and these are three of my interests.

- Last holiday destination I went to ...because...

- Tell me about the community you work in.

Key Mentoring Questioning Concepts in Detail – cont'd

TOPIC 2 - Establishing Mentoring Protocol

The purpose of this topic is to ensure that the structure of the mentoring relationship is well defined to minimise the potential of risk and/or surprises.

Initial Conversation - questions for the mentor to consider and/or ask.

- How will we meet?
- When should we first meet and how?
- These are the times and dates I can manage over the next fortnight.

Planning Mentoring Meeting - questions for the mentor to consider and/or ask.

- Who do you think should be included in these meetings?
- Do we talk about our meetings with others?
- When would you be happy for me to break confidentiality?
- What are the communication mediums we are happy to use?
- What are the times that we are available on phone/Facebook/email/ fax?
- When are we going to review our mentoring relationship?
- How often should we review how we are performing?
- What areas am I happy to talk about but unable to provide assistance with?
- What are the “no go zones”?

TOPIC 3 - Identifying Mentees Needs

The purpose of this topic is to ensure that the right questions and consequent concepts are discussed during the mentoring meetings.

Initial Conversation - questions for the mentor to consider and/or ask.

- Why have you chosen me as your mentor?
- What do you believe I am able to do for you?
- This is what I think I can give you... how does that correlate?

Setting the Scene for Mentoring Meetings

Setting the scene – *this mentoring relationship is primarily about personal enhancement not career pathways. It is also important to note that the role of the mentor is to guide and question. Key outcomes are supporting the mentee on their journey.*

- Provide me with details about your role and responsibilities within the community?
- What areas of advancement are you seeking assistance with?
- What are the parts of your work that you enjoy the most?
- How can we enhance these areas?

- What are the elements of leadership you find most challenging?
- How we can support you in addressing these challenges?
- Where would you like to be in 12 months? 3 years? 5 years?
- Let's distil these aspirations and work on things we can maximize using my skill set
- These are what I would hope you could do in response to my assistance.

TOPIC 4 - Confirming Next meeting

The purpose of this topic is to discuss questions that will continue to set the agenda for ongoing capacity building.

Initial Conversation - questions for the mentor to consider and/or ask.

- Time, date, communication medium, agenda.

Reviewing the Mentoring Meetings

- Is this format, communication medium, mentor and mentee role etc., working for us?
- Is the confirmation of time and date done?
- Establishing knowledge – what further information should we share? I like to talk to you about my own key life learnings, would you be happy to discuss the same? I would also like to discuss with you who I believe are great models of leadership and why?
- Reviewing protocol – this is what I would like us to review... what do you think should be reviewed?
- Mentee needs – after this meeting what do you feel are the key areas we must consider?
- Mentor needs – what new needs could we address? These are the people I want you to network with.

16.5 Managing A Mentoring Meeting

The Mentoring Process

The whole point of the mentoring process is to create a reflective environment in which the mentee can address issues of leadership growth, the management of relationships and the management of situations, both current and predicted.

Framework for a mentoring meeting

PART	DESCRIPTOR
<i>Reaffirmation</i>	Mentor and mentee spend time at the beginning re-establishing the personal connection, before getting down to business. In a well-established mentoring relationship, there is a reaffirmation of mutual respect, a recognition of each other's emotional state and a demonstration of interest in the other person.
<i>Identifying the issue</i>	Mentor and mentee spend time articulating what the issue for discussion is, why it is important (and why now) and what outcome the mentee is looking for from the dialogue to come. This is also an opportunity for the mentee to indicate any preferences for <i>how</i> he or she would like the mentor to help.
<i>Building mutual understanding</i>	The mentor encourages the mentee to explore the issue in depth, by asking questions that stimulate insight. The aim of the questions is for both parties to understand more clearly what is involved, how the problem came about, what its dynamics are and so on. The mentor is careful at this stage to avoid entering solution mode. The mentor may summarise and to check that they have achieved mutual understanding.
<i>Exploring alternative solutions</i>	The mentor and mentee allow themselves to be creative about possible ways forward, developing a range of options from which the mentee eventually chooses or decides which to take away for reflection. In the former case, the mentor may help the mentee set deadlines and KPI's or similar.
<i>Final check</i>	The mentor encourages the mentee to review what he or she is going to do and why, and what the mentee has learned about both the situation in question and about him or herself. This provides a check on the level of mutual understanding and places the responsibility with mentee's.

Question – Have you considered the line of questions/comments that will move you through the process above?

<ul style="list-style-type: none"> • • • • • •
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16.6 Meeting Agenda Template

Date:

Time:

Location:

Items for Discussion

Item 1

Notes from discussion Item 1

Item 2

Notes from discussion Item 2

Item 3

Notes from discussion Item 3

Item 4

Notes from discussion Item 4

Summary of discussion and outcomes:

Next Meeting Details:

16.7 Mentee “Change Plan”

What Change	Why Change	Anticipated outcomes from Change	How to Change	Who will assist	When to Change	Questioning Change

16.8 Enhance the Mentoring Relationship

The *Enhance the Mentoring Relationship* information has two sections:

SECTION 1 – *What Are We Achieving* - a thinking activity to assist in identifying the stage the mentoring relationship is at currently; and

SECTION 2 – *Progressing the Mentoring Relationship* - establishing a new process to provide greater challenges for enhancing the mentoring relationship.

SECTION 1 – What Are We Achieving?

PART A - A thinking activity

Question 1 – How have our meetings progressed?

Some initial responses....

1. We haven't met at all or only once
2. We have met a number of times but just for a chat
3. We have met but we have no structure and are not getting anywhere
4. We are meeting but we have no meeting schedule
5. Our meetings are enjoyable but our goals are vague and difficult to discuss
6. I don't think this is ever going to work
7. Not sure – mentee/mentor seems disengaged
8. It is progressing really well – what happens next?

To assist, consider responding to the following questions:

Question 2 - Which of the previous eight initial responses resonate with you? As the mentor or mentee provide a “next step”.

Responses and Solutions – Below are some solutions to the above responses:

Response - We haven't met at all or only once

Solution: It is suggested that a conversation must be had in this situation to re-establish the relationship purpose. At a basic level you must show leadership and communicate a pathway forward.

Response - We have met a number of times but just for a chat

Solution: Initiate a set of goals to be developed. Review “How to be a mentor/mentee” sheet and set the agenda for the next meeting to discuss and finalise the goals of the mentee and mentor.

Response - We have met but we have no structure and are not getting anywhere

Solution: Someone must take the lead here – set a meeting calendar for the next three months and agenda for each meeting. At the conclusion of each meeting review if the agenda has been covered.

Response - We are meeting but we have no meeting schedule

Solution: Look at the above solution and begin to put in place an agenda for each meeting. Perhaps an agenda is not being set because goals and direction haven't been set. You may need to review “How to be a mentor/mentee” sheet.

Response - Our meetings are enjoyable but our goals are vague and/or difficult to discuss

Solution: Review the above solution.

Response - I don't think this is ever going to work

Solution: Don't give up... give Program Manager, Jill Briggs at Affectus, a call on 0409455710. However if there is no way the relationship is going to work then the next step is to communicate what has happened and close the relationship professionally. Hoping it will just “disappear” will make future meetings difficult and potentially embarrassing.

Response - Not sure – mentee/mentor seems disengaged

Solution: Communicate and ask the obvious questions – “wondering what we can do to get the mentoring relationship progressing”?

Response - It is progressing really well – what happens next?

Solution: Stay tuned to get the relationship really moving along.

Section 2 – Progressing the Mentoring Relationship

Step 1.

Review the process to date.

Objective Facts: What are the facts about the mentoring relationship?

Reflective Feelings: How do you feel about the facts above? How do you imagine the mentor/mentee feels about the facts above?

Interpretive Concepts: What does this reveal about you and mentoring?

Decisional Actions: What will you do now regarding this mentoring relationship?

Step 2.

Encourage the other person in the relationship to review the mentoring process to date using Step 1 with the intention to review comments at the next meeting.

Step 3.

It is over three months since forming the mentoring relationship and it is time to consider the relationship and outcomes to date.

Set the agenda for the next meeting to commence with the reviewing comments generated in Step 1.

These are the questions that will assist in moving through the review process:

• What were the facts of the mentoring relationship that you remembered?
These are the ones I would like to add...
Are there any others?

• What were the feelings that the mentoring relationship has generated for you?
These are the ones that I also thought of...

• So this is what I interpreted about my facts and feelings?
What about your interpretation?

• Decisional actions? What did you come up with?
This is what I came up with.
How can we work with both of these sets of actions?

Step 4.

Having completed the review process you may now have a strong idea or direction for the next four-six months. However the review may have only provided you both with a way of working together more effectively. If this is the case, the next stage will ensure that you have an opportunity to reconsider the direction you are heading. It is encouraged that you make sure that you are maintaining a clear focus.

Some questions that may assist you in moving to a new, more effective level in your mentoring relationship are outlined below.

- What areas of advancement are you seeking assistance with?
- What are the parts of your work that you enjoy the most?
- How can we enhance these areas?
- What are the elements of leadership you find most challenging?
- How we can support you in addressing these challenges?
- Where would you like to be in the community in 12 months? Three years? Five years?
- Let's distil these aspirations and work on things we can maximize using my skill set.
- These are what I would hope you could do in response to my assistance

16.9 An Evolving Mentoring Relationship

An Evolving Mentoring Relationship includes two sections:

SECTION 1 – *Mentoring - Transitions and Circumstances*

SECTION 2 – *Mentoring – Evolving.*

SECTION 1 – Mentoring – Transitions and Circumstances

Mentoring is about support in significant transitions. The mentor has a role to help the mentee grasp the wider significance of whatever is happening, where at first sight it might appear trifling or insignificant. The nature of the mentoring relationship is dynamic, in the sense that it:

- Will be different according to the circumstances, purpose and personalities involved; and
- Evolves over time.

The Effect of Circumstances

Some of the factors that influence circumstance include:

- The social environment in which the relationship occurs e.g. workplace or organisation
- The level of formality e.g. ad hoc or part of a structured program
- The gap in age, influence, experience and ability of the participants
- The expected and actual duration of the relationship
- The degree of rapport felt between the participants
- The extent and nature of the support that the mentor provides and that the mentee is seeking
- The motivation of both mentor and mentee to achieve change.

All of these factors are likely to have an impact on the expectations, behaviours and interactions during the mentoring relationship.

Think about the above ...

Question - What are the circumstances of your mentoring relationship?

Question - What might be the impact of these circumstances?

Section 1 information has been developed through sourcing materials particularly Stone, F. (2007) Coaching, Counselling and Mentoring : How to Choose and Use the Right Technique to Boost Employee Performance

 SECTION 2 – Evolving

How Mentoring Relationships Evolve

There is a period in which the relationship gels and where rapport and its constituent elements — particularly trust — are established; another where the relationship assumes a greater sense of direction and purpose; and a period in which the relationship either comes to a close or metamorphoses into a supportive friendship.

Stages of the Mentoring Relationship

Once started, mentoring relationships tend to follow a common pathway of evolution. How each stage is managed may have a significant influence on the quality of the relationship.

Stage	Descriptor
Building Rapport	<p>Mentor and mentee explore whether they are able to work together. The ability to establish rapport depends on a number of factors, including:</p> <ul style="list-style-type: none"> • Their perception of alignment of values, especially at a personal level • The degree of mutual respect • Broad agreement on the purpose of the relationship • Alignment of expectations about roles and behaviours. <p>Achieving this level of rapport can only happen through dialogue — an open exchange that relaxes the typical barriers between strangers. If rapport does not occur it is incumbent on both parties to explore the issue, rather than pretend it does not exist.</p>
Setting Direction	<p>Addresses goal setting. Although the initiation of the relationship involves at least a sense of purpose, at this stage mentor and mentee clarify and refine what the relationship should achieve on both sides. The process of rapport building continues as they explore tactical responses to some of the issues raised.</p>
Progression	<p>Is the core period. While rapport building and goal setting can often be accomplished in a few meetings, the progress-making stage typically lasts at least six months. Mentor and mentee become more relaxed about challenging each other's perceptions, explore issues more deeply and experience mutual learning. The mentee takes more and more of the lead in managing the relationship and the mentoring process.</p>
Winding Up	<p>Occurs when the mentee has achieved a large part of his or her goals or feels equipped with the confidence, plans and insights to continue the journey under their own steam. For either mentor or mentee to seek to hang on to the formal relationship is likely to result in an unhealthy dependency or counter-dependency. Winding up (reviewing and celebrating what has been achieved) is almost always more effective than winding down (drifting apart).</p>
Moving On	<p>Is about moving on and reformulating the relationship, typically into a friendship, in which both parties can use each other on an ad hoc basis as a sounding board and source of networking contacts.</p>

Moving from one stage to another is not necessarily a clearly defined step. There is often a grey area between and possible overlap, particularly at the early stages. Mentors and mentees need to be sensitive to the stage of relationship development and adapt their behaviours accordingly.

Question - Which stage is your mentoring relationship at currently? How you might move to the next stage?

16.10 Coming to Closing

Coming to Closing includes two sections:

SECTION 1 – *Things to Consider*

SECTION 2 – *Coming to Closing*.

SECTION 1 – Things to Consider

Mentoring relationships don't go on indefinitely. At some point, they end. It may be a formal, predictable end, or it may not. When closure is planned for, it is often easier, but still it presents its own set of challenges.

There are number of things that the mentor and mentee can do to ensure satisfying and meaningful closure:

- 1. Be proactive.** Don't wait until the end to begin! Agree on how you will come to closure when you first negotiate your mentoring partnership. Discuss and plan how you will come to closure — if it is planned or unplanned. Set ground rules for having the discussion. Make one of those ground rules an agreement to end on good terms. Many mentoring partners adopt the no-fault rule, meaning that there is no blaming if the partnership is not working or one person is uncomfortable.
- 2. Look for signals.** Keep your antenna up so you can recognise signs that the relationship may be ending. Check out your perceptions and assumptions when the first indicators appear. What you think you see may be a reflection of your on anxiety, fear, or hope.
- 3. Respect the other person.** If he or she wants to end the relationship and you don't, you must honor their wishes. You may want to leave the door open in case circumstances change. Time is the most frequent cause of mentoring relationship derailment. Being flexible but focused is helpful. Always get a date on the calendar. If you need to close on a meeting, do it, but make sure you schedule your next one when you do. Used wisely, a calendar reminder is a contact point for communication.
- 4. Evaluate the relationship.** Periodically, check out the health of the relationship. Make sure your needs and those of the other are both being met. Don't wait for derailment. Make ongoing evaluation a commitment along the path to continuous improvement. Don't leave evaluation to chance. Start on the right foot and check in regularly.
- 5. Review your goals.** Regularly review your goals and objectives. Take stock and process learning. Gauge where you are in the accomplishment of the "change plan". Don't let the relationship disintegrate or "fizzle out." If you've met all the goals and objectives, it is time to celebrate and move on. If you chose to move on, review what has worked and what got in the way. Make it a point to rearticulate goals and renegotiate the terms if you chose to continue the relationship.

6. Integrate. When it is time to come to closure, ask how you can use what you've learned. Without closure, you lose the value-added dimension of integration. Good closure involves taking what you've learned from the mentoring relationship and applying it. What are the implications? What did you learn? Where do you go from here?

7. Never assume. Remember that there are two people in the relationship. Does each of you know how the other feels? Be vocal in your appreciation of each other. Celebrate your accomplishments together.

SECTION 2 – Coming to Closing

The phrase "coming to closing" suggests a process. In the mentoring relationship, good closure is synonymous with learning and development. Good closure should catapult you forward into a new stage. Lack of closure or poor closure can impede growth.

Although individual needs for closing varies, closing is essential for growth. Whether closing is unanticipated or planned, dealing with it together and directly is critical for a successful mentoring relationship. The importance of the "closing conversation" cannot be over emphasised. It is during this conversation that learning takes place, that appreciation gets articulated, and that celebration occurs. It is also the occasion for renegotiation: to determine if this is relationship might continue, and if so, on what basis.