

Who is Holding the Rope for You?



Building Effective Mentoring Relationships

Mentoring Workbook

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MENTOR READINESS ASSESSMENT

Mentor Characteristics Survey

Take a few minutes and complete the following Mentor Characteristics Survey.

This survey should be completed to assess whether you're ready to be a mentor or not. Assess each characteristic by asking: *Am I...?* or *Do I...?*

Circle the appropriate number using the scale below as a guide:

- 1=Always**
- 2=Frequently**
- 3=Sometimes**
- 4=Rarely**
- 5=Never**

Effective Characteristics	Always					Never
	1	2	3	4	5	
1. Spot the Potential & Believe in Others	1	2	3	4	5	
2. A Networked & Resourceful Guide	1	2	3	4	5	
3. Display Patience and Tolerance	1	2	3	4	5	
4. Give Encouragement	1	2	3	4	5	
5. See the Big Picture	1	2	3	4	5	
Ineffective Characteristics	Always					Never
	1	2	3	4	5	
1. Too Busy to Mentor	1	2	3	4	5	
2. Use the Mentee as Help	1	2	3	4	5	
3. Overly Critical	1	2	3	4	5	
4. Not with the Times	1	2	3	4	5	
5. Ego Striving	1	2	3	4	5	

Based on this evaluation, are you ready to become a mentor? If not, what would need to be done in order to get ready?

MENTEE READINESS ASSESSMENT

Mentee Characteristics Survey

Take a few minutes and complete the following Mentee Characteristics Survey.

This survey should be completed to assess whether you're ready to be a mentee or not. Assess each characteristic by asking: *Am I...?* or *Do I...?*

Circle the appropriate number using the scale below as a guide:

- 1=Always**
- 2=Frequently**
- 3=Sometimes**
- 4=Rarely**
- 5=Never**

Effective Characteristics	Always					Never
	1	2	3	4	5	
1. Goal-Oriented	1	2	3	4	5	
2. Seek Challenges	1	2	3	4	5	
3. Take Initiative	1	2	3	4	5	
4. Show Eagerness to Learn	1	2	3	4	5	
5. Accept Personal Responsibility	1	2	3	4	5	
Ineffective Characteristics	Always					Never
	1	2	3	4	5	
1. Too Self-Promoting	1	2	3	4	5	
2. Too Busy	1	2	3	4	5	
3. Lack Passion for Others' (Mentor's) Area of Expertise	1	2	3	4	5	
4. Lack Focus	1	2	3	4	5	
5. Overly Dependent	1	2	3	4	5	

Based on this evaluation, are you ready to become a mentee? If not, what would need to be done in order to get ready?

Sample Completed Mentoring Partnership Agreement

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

- To develop a leadership career pathway to prepare the mentee to assume a significant high-profile leadership position within the community
- To assist mentee in depth analysis of leadership strengths and weaknesses
- To create a leadership development plan for mentee
- To introduce mentee to best-practice leadership experiences

We have discussed the protocols by which we will work together, develop, and, in that same spirit of partnership, collaborate on the development of a work plan. In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly.

Our specific schedule of contact and meetings, including additional meetings, is as follows:
We will meet twice a month and be in contact by telephone or e-mail at least once a week.

2. Look for multiple opportunities and experiences to enhance the mentee's learning.

We have identified, and will commit to, the following specific opportunities and venues for learning:
Mentee will attend board meetings as mentor's guest. We will meet prior to each meeting and debrief following each meeting.
Mentee will attend a nonprofit institute with mentor.
Mentee and mentor will attend community leadership forum meetings.

3. Maintain confidentiality of our relationship.

Confidentiality for us means that what we discuss remains between us. Mentor and mentee will agree ahead of time if specific information is to be shared with anyone else.

4. Honor the ground rules we have developed for the relationship.

Our ground rules will be: We will meet after business hours. Mentee will assume responsibility for confirming meetings. Mentee will pay for own expenses. Mentee will maintain an ongoing journal of mentoring experience. At the conclusion of each meeting, we will target topics for discussion at the next session.

5. Provide regular feedback to each other and evaluate progress. We will accomplish this by:

Reviewing learning goals once a month, discussing progress, and checking in with each other regularly for the first month to make sure our individual needs are being met in the relationship, and periodically thereafter.

We agree to meet regularly until we have accomplished our predefined goals or for a maximum of eighteen months. At the end of this period of time, we will review this agreement, evaluate our progress, and reach a learning conclusion. The relationship then will be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated the mutually agreed-on goals.

In the event one of us believes it is no longer productive for us to continue or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event we agree to use closure as a learning opportunity.

Mentor's Signature and Date

Mentee's Signature and Date

Mentoring Action Plan Worksheet

Name: _____

Date: _____

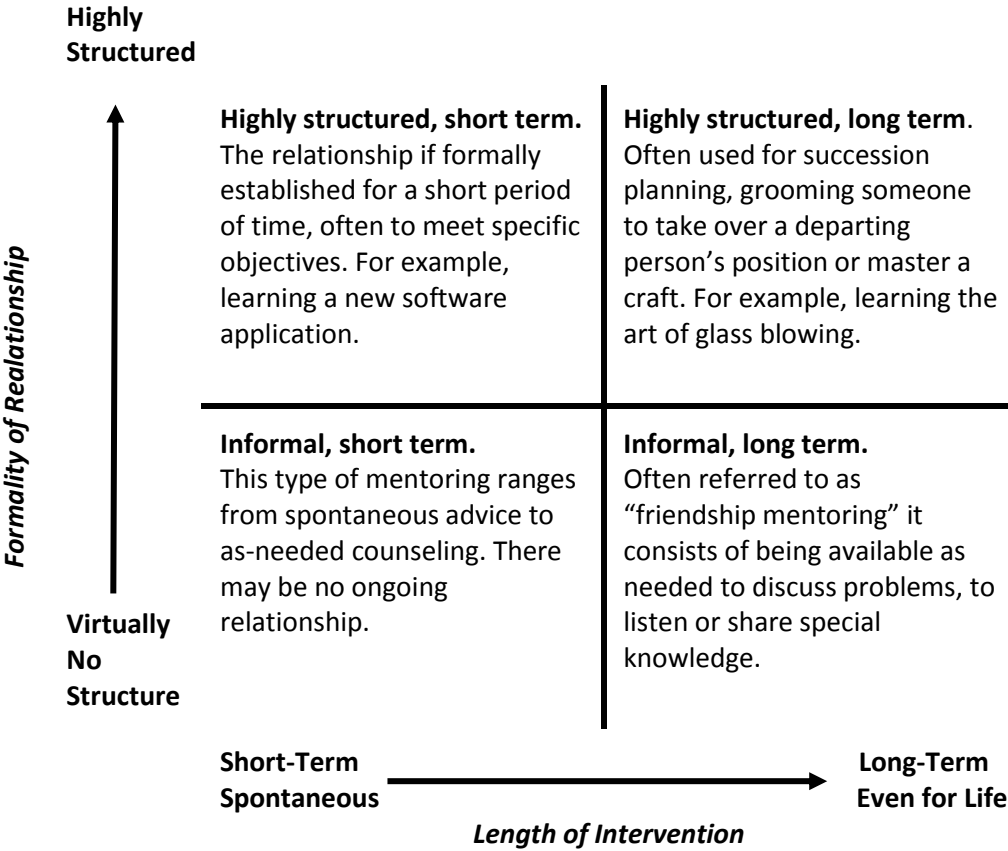
Career Goal: _____

Knowledge to Gain/Skills to Build/Attitudes to Develop to Accomplish my Career Goal. <i>(What must I acquire/improve?)</i>	Projected Outcome <i>(How will I know I did it?)</i>	Action Steps <i>(How will I actually gain/build/develop these?)</i>	Resources Needed <i>(Besides the help of my mentor, I will need what?)</i>	Target Completion Date <i>(When will I be there?)</i>

Adult Learning Principles with Implications

Adult Learning Principle	Mentoring Element	Implications for Mentor and Mentee
Adults learn best when they are involved in diagnosing, planning, implementing, and evaluating their own learning.	Mentee role	
The role of the facilitator is to create and maintain a supportive climate that promotes the conditions necessary for learning to take place.	Mentor role	
Adults have a need to be self-directing.	Learning process	
Readiness for learning increases when there is a specific need to know.	Length of relationship	
Life's reservoir of experience is a primary learning resource; the life experiences of others add enrichment to the learning process.	Mentoring relationship	
Adult learners have an inherent need for immediacy of application.	Setting	
Adults respond best to learning when they are internally motivated to learn.	Focus	

Types of Mentoring Relationships-Mentor



Adapted from: Shea, Gordon, *Mentoring*, 2002

Mentoring can take the form of one-time intervention or a lifelong partnership. It can be as formal as a structured employee orientation or as informal as an element of a professional friendship. We have all had these experiences, both as a mentor and a mentee. Please Use this worksheet and describe one relationship you have experienced or observed for each of the four categories shown.

Highly structured, short term _____

Highly structured, long term _____

Informal, short term _____

Informal, long term _____

Mentor Motivation Inventory

For each item below, put a check in the “yes” column if the reason listed reflects why mentoring appeals to you. If it does not, put a check in the “no” column. Following each item, list concrete examples to illustrate your answer.

Reasons that Mentoring Appeals to Me:	Yes	No	Examples
I like the feeling of having others seek me out for advice or guidance.			
I find that helping others learn is personally rewarding.			
I have specific knowledge that I want to pass on to others.			
I enjoy collaborative learning.			
I find that working with others who are different from me to be energizing.			
I look for opportunities to further my own growth.			

Complete these questions as truthfully as you can.

I want to be a mentor because:

My experience and expertise will contribute to this relationship by:

Adapted from: Zachary, L. *The Mentor’s Guide*. . 2000

What Would You Do? Mentor

Here's a dilemma faced by an actual mentor. Read the facts, put yourself in this situation, and choose your preferred solution...or develop your own! Go here to see how your solution compares to the answer suggested by The Mentoring Group.

Scenario

You agreed to be a mentor in your organization's new mentoring program. After a lengthy matching process, you were paired with a person who is extremely shy. You're very outgoing, so this has proved a challenge for you. Your mentee is very diligent, shows up for all your meetings, does mentoring homework, and frequently expresses appreciation to you. You notice that when you and this person are talking she/he almost never makes eye contact with you. Most of the people in your organization value eye contact. What do you do?

Possible Responses

- A.** You assume this is a cultural or style difference not only to accept but to respect and honor. You cut down on the amount of eye contact you make with her/him.
- B.** You start smiling broadly every time he/she looks you in the eye. You believe if you do this often enough, through conditioning, your mentee will start making more eye contact with you.
- C.** You write a note to your mentee describing what you've noticed and suggesting he/she make more eye contact. You recommend that this be one of the goals the two of you work on in your relationship.
- D.** You bring up the topic of conversation styles in your organization and what seems to be valued. You ask your mentee if she/he has ever noticed anything about looking into people's eyes and you share your own experiences on the issue.

Suggested Response

We vote for **D** (gently bring up the topic and share your ideas and seek his/hers). One role of mentors (especially in U.S. organizations) is to help their mentees succeed and that usually means helping them do well in the mainstream. You can be sensitive to cultural and style issues, explore his/her reasons about having little or more eye contact, teach what you've learned, and encourage your mentee to try a variety of eye responses in different situations. Once you've had this conversation, your mentee may or may not want to choose this as a development objective.

- A.** (not saying anything and adapting your own style) You could certainly ignore the situation and hope some other mentor is more comfortable approaching this issue later. Yet you may be the only one honest enough to tackle what could be a career-limiting behavior. By changing your own eye contact in this relationship, you're not being yourself and you're giving a false message.
- B.** (using conditioning) This might work over a long time, but how much time do you have to devote to this partnership? Also, you run the risk of being misinterpreted!
- C.** (writing a note and asking for the change) This might feel easier, but it prevents your using the in-person discussion to illustrate your point. Just asking your mentee to change doesn't take into account why he/she is behaving in this way.

Source: THE MENTORING GROUP, www.mentoringgroup.com

Listening is Never Easy!

Mentor Exercise

- 1 Think of someone you know who doesn't seem to listen to you. What does this person do to let you know h/she isn't listening?
- 2 How do you feel when talking to this person?
- 3 Think of a person who listens to you well. What do they do?
- 4 How do you feel when talking to this person?
- 5 Think of a time when you didn't listen effectively. What happened?
- 6 Think of a time when you did listen effectively. What happened?

Listening is Never Easy - Statements

Statements that help us to do this		Examples
<u>Statements that reflect back</u>		
Show that you understand how the person feels	Reflect the speaker's basic feelings	'You seem very upset.'
Help the person think about his/her feelings after hearing them expressed by someone else		'You sound rather cross.'
<u>Statements that summarise</u>		
Review progress	Restate major ideas expressed, including feelings	'These seem to be the key ideas you have expressed...'
Pull together important ideas and facts		'What you seem to be saying is...'
Establish a basis for further discussion		
<u>Statements that appreciation</u>		
Show you value the speaker	Acknowledge the importance of their concerns and feelings	'I appreciate your willingness to talk about this.'
	Show appreciation for their efforts and actions	'I'm glad you told me.'

More examples

Reflective statements: Verbally reflect back what your partner has just said. This helps you to check whether or not you understood your partner, and helps your partner feel understood.

For example:

- "So it seems that you're overwhelmed with your workload."
- "It seems that you are concerned about starting this tutorial on the new software because of the age of your computer."

Summarizing statements: Select main points from a conversation and bring them together in a complete statement. This helps to ensure that the message is received correctly.

For example, "Let me tell you what I heard, so I can be sure that I understand you. You said that the main thing bothering you today is a headache that won't go away and is worse at night. Is that right?"

Appreciation statements: Share your appropriate personal feelings, attitudes, opinions, and experiences to increase the intimacy of communication.

For example, "I can relate to your difficult situation, I have experienced something similar and recall being very frustrated. Hopefully I can assist you to figure out how to move forward."

Listening is Never Easy - Questions

Questions that help us to do this		Examples
<u>Questions that encourage</u>		
Convey interest	Do not agree or disagree	'Can you tell me more?'
Encourage the other person to keep talking	Use neutral words	'I see' 'mm-mm' 'Go on...' 'Then?'
<u>Questions that clarify</u>		
Help you clarify what is said	Ask questions, infrequently use open questions	'When did this happen?'
Get more information	Convey your uncertainty	'How do you think ... felt?'
<u>Questions that restate</u>		
Show you are listening	Restate basic ideas, facts in listener's own words	'You would like me to trust you more. Is that right?'
Check whether you have understood what has been said		

Open-ended Questions

All of the questions we have discussed are considered open-ended questions. They are questions that encourage people to talk about whatever is important to them. They help to establish rapport, gather information, and increase understanding. They are the opposite of closed-ended questions that typically require a simple brief response such "yes" or "no."

To illustrate closed-ended vs. open-ended questions, consider the following example. The topic is the same in both questions, but the responses likely will be very different.

Did you have a good relationship with your parents? (closed-ended)

Tell me about your relationship with your parents. (open-ended)

Now turn these closed-end questions into open-ended questions:

1. Can I help you? _____
2. Would you like to talk about your review? _____
3. Are there pros and cons about the position? _____
4. Do you realize you will lose if you give up? _____
5. Have you tried other methods? _____

- | | |
|----|---|
| 1. | How can I be of help? |
| 2. | Would you tell me more about your review? |
| 3. | What are the good things and the less good things about the position? |
| 4. | What do you think you will lose if you give up? |
| 5. | What have you tried |

Additional Types of Questions Used by Mentors

Type of Question	Purpose of Question	Examples
Reflective	Get mentee to say more about an issue and to explore it in more depth	"You said ... can you explain in more detail how you mean this?"
Hypothetical	Introduction of new ideas on the part of the mentor; making suggestions	"What about...?" "What if...?"
Justifying	Obtaining further information on reasons, attitudes, feelings	"Can you elaborate on what makes you think that?"
Probing	Discovering motivations, feelings and hidden concerns	"What would you perceive as the cause of this?" "When did you first experience that?"
Checking	Establishing whether the mentee has understood clearly	"Are you sure about that?" "Why do you feel this way?"

Source: Klasen & Clutterbuck, 2002:158

Demonstrate your understanding of the purpose of each of these question types by providing an additional example for each type:

Reflective _____

Hypothetical _____

Justifying _____

Probing _____

Checking _____

Roles, Activities and Skills of a Mentor

Skill	Examples
Building and sustaining the personal relationship	<ul style="list-style-type: none"> a. talk time focused on feelings b. talk about mentoring and personal experiences c. get to know each other d. periodically review and discuss needs e. social time together
Networking with others	<ul style="list-style-type: none"> a. join professional associations b. encourage involvement and leadership roles in local, state, and national professional associations c. model the development of contact networks
Coaching	<ul style="list-style-type: none"> a. fill knowledge gaps in a variety of "how to" situations b. observe performance on-site and identify learning needs c. identify ways to work smarter rather than harder
Communicating	<ul style="list-style-type: none"> a. schedule mentoring meeting b. phone conversations c. e-mails d. observe speaking opportunities, seminars, etc.
Encouraging	<ul style="list-style-type: none"> a. write notes, compliments, calls, praise, contacts, listening
Facilitating	<ul style="list-style-type: none"> a. share files, read books, share work samples, co-present at conferences
Goal Setting	<ul style="list-style-type: none"> a. review personal goals and aspirations b. develop and critique professional goals and progress c. encourage building initiatives and professional development d. encourage advanced degree work
Guiding	<ul style="list-style-type: none"> a. discuss, review options but do not tell mentee a specific way to do something b. listen, ask questions for clarity
Conflict management	<ul style="list-style-type: none"> a. discuss conflict reaction characteristics and comfort levels b. model resolution skills c. listen, share, and guide as situations develop
Problem solving	<ul style="list-style-type: none"> a. brainstorm, evaluate, model, reflect
Providing and receiving feedback	<ul style="list-style-type: none"> a. evaluate oral and written communications b. review planning and implementation of programs
Reflecting	<ul style="list-style-type: none"> a. personal talk time; debrief; share stories; document events, activities, and incidents b. adult learning

Mentor's Strategies for an Effective Mentoring Conversation

Agenda Items	Strategies for Conversation	Possible Mentor Approaches
Take time getting to know each other.	Obtain a copy of the mentee's bio in advance. If one is not available, create one through conversation.	Establish rapport. Exchange information. Identify points of connection.
Talk about mentoring	Ask: Have you ever been engaged in a mentoring relationship? If so, what did you learn from that experience?	Talk about your own mentoring experiences.
Determine the mentee's goals	Ask: What do you want to learn from this experience? Give the mentee an opportunity to articulate broad goals.	Determine if the mentee is clear about his or her goals and objectives.
Determine the mentee's relationship needs and expectations.	Ask: What do you want out of this relationship?	Be sure you are clear about what your mentee wants from the mentoring relationship.
Define the deliverables and a time table.	Ask: What would success look like for you? What is your timetable for achieving it?	Do you have an area of expertise that is relevant to the mentee's learning goals?
Share your assumptions, needs, expectations and limitations with candor and confidentiality.	Ask for feedback. Discuss: Implications for the relationship.	What are you willing and cable of contributing to the relationship?
Discuss options and opportunities for learning.	Ask: How would you like to go about achieving your learning goals? Discuss: Learning and communication styles Ask: What is the most useful kind of assistance I can provide? Discuss means: Shadowing, project, etc.?	Discuss the implications of each other's styles and how that might affect the mentoring relationship.

Sample Completed Mentoring Partnership Agreement

Sample Mentoring Partnership Agreement

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

- To develop a leadership career pathway to prepare the mentee to assume a significant high-profile leadership position within the community
- To assist mentee in depth analysis of leadership strengths and weaknesses
- To create a leadership development plan for mentee
- To introduce mentee to best-practice leadership experiences

We have discussed the protocols by which we will work together, develop, and, in that same spirit of partnership, collaborate on the development of a work plan. In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly.

Our specific schedule of contact and meetings, including additional meetings, is as follows:

We will meet twice a month and be in contact by telephone or e-mail at least once a week.

2. Look for multiple opportunities and experiences to enhance the mentee's learning.

We have identified, and will commit to, the following specific opportunities and venues for learning:

Mentee will attend board meetings as mentor's guest. We will meet prior to each meeting and debrief following each meeting.

Mentee will attend a nonprofit institute with mentor.

Mentee and mentor will attend community leadership forum meetings.

3. Maintain confidentiality of our relationship.

Confidentiality for us means that what we discuss remains between us. Mentor and mentee will agree ahead of time if specific information is to be shared with anyone else.

4. Honor the ground rules we have developed for the relationship.

Our ground rules will be: We will meet after business hours. Mentee will assume responsibility for confirming meetings. Mentee will pay for own expenses. Mentee will maintain an ongoing journal of mentoring experience. At the conclusion of each meeting, we will target topics for discussion at the next session.

5. Provide regular feedback to each other and evaluate progress. We will accomplish this by:

Reviewing learning goals once a month, discussing progress, and checking in with each other regularly for the first month to make sure our individual needs are being met in the relationship, and periodically thereafter.

We agree to meet regularly until we have accomplished our predefined goals or for a maximum of eighteen months. At the end of this period of time, we will review this agreement, evaluate our progress, and reach a learning conclusion. The relationship then will be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated the mutually agreed-on goals.

In the event one of us believes it is no longer productive for us to continue or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event we agree to use closure as a learning opportunity.

Mentor's Signature and Date

Mentee's Signature and Date

Template Mentoring Partnership Agreement

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

We have discussed the protocols by which we will work together in partnership and collaborate on the development of a work plan. In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly.

We agree that our specific schedule of contact and meeting, including additional meetings, is as follows: _____

2. Look for multiple opportunities and experiences to enhance the mentee's learning.

We agree to the following specific opportunities and venues for learning:

3. Maintain confidentiality of our relationship.

We agree that confidentiality encompasses:

4. Honour the ground rules we have developed for the relationship.

We agree the ground rules as:

5. Provide regular feedback to each other and evaluate progress.

We agree to accomplish this by:

We agree to meet regularly until we accomplish our predefined goals or for a maximum of [specify timeframe]. _____ At the end of this time, we will review this Agreement, evaluate our progress and reach a learning conclusion. Once we have agreed on this, the relationship will be considered complete.

However, if we choose to continue the mentoring partnership, we may negotiate a basis for continuation, as long as we have stipulated mutually agreed terms and goals.

In the event that one of us believes the relationship is no longer productive or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event, we agree to use closure as a learning opportunity.

Mentor's signature
Date: _____

Mentee's Signature
Date: _____

Mentoring Action Plan Worksheet

Name: _____

Date: _____

Career Goal: _____

Knowledge to Gain/Skills to Build/Attitudes to Develop to Accomplish my Career Goal. <i>(What must I acquire/improve?)</i>	Projected Outcome <i>(How will I know I did it?)</i>	Action Steps <i>(How will I actually gain/build/develop these?)</i>	Resources Needed <i>(Besides the help of my mentor, I will need what?)</i>	Target Completion Date <i>(When will I be there?)</i>

Tips for Mentors

Make a special effort to be available to your mentee at least once every two months, away from the distractions of your work, if at all possible.

Interact and share – share your mistakes and struggles, as well as your successes.

Share your specific expectations for the relationship up-front with your mentee.

Invest time in learning about the aspiration, attributes and preferences of your mentee, the better you know your mentee the more detailed guidance you can provide.

Periodically identify special learning opportunities in your organization or in professional networks for your mentee.

Actively assist the mentee in developing his/her own personal network of professional contacts.

Honor any commitments to and confidences of your mentee.

Be clear about purpose and boundaries.

Periodically validate with your mentee the value of the information and counsel you are providing.

Provide honest, caring, regular, and diplomatic feedback to your mentee.

Listen deeply and ask powerful questions.

Maintain and respect privacy, honesty and integrity.

Accept that the relationship is temporary, but be alert for the possibility that it may exceed for a longer time frame, this should be a mutual agreement as to how you wish to proceed

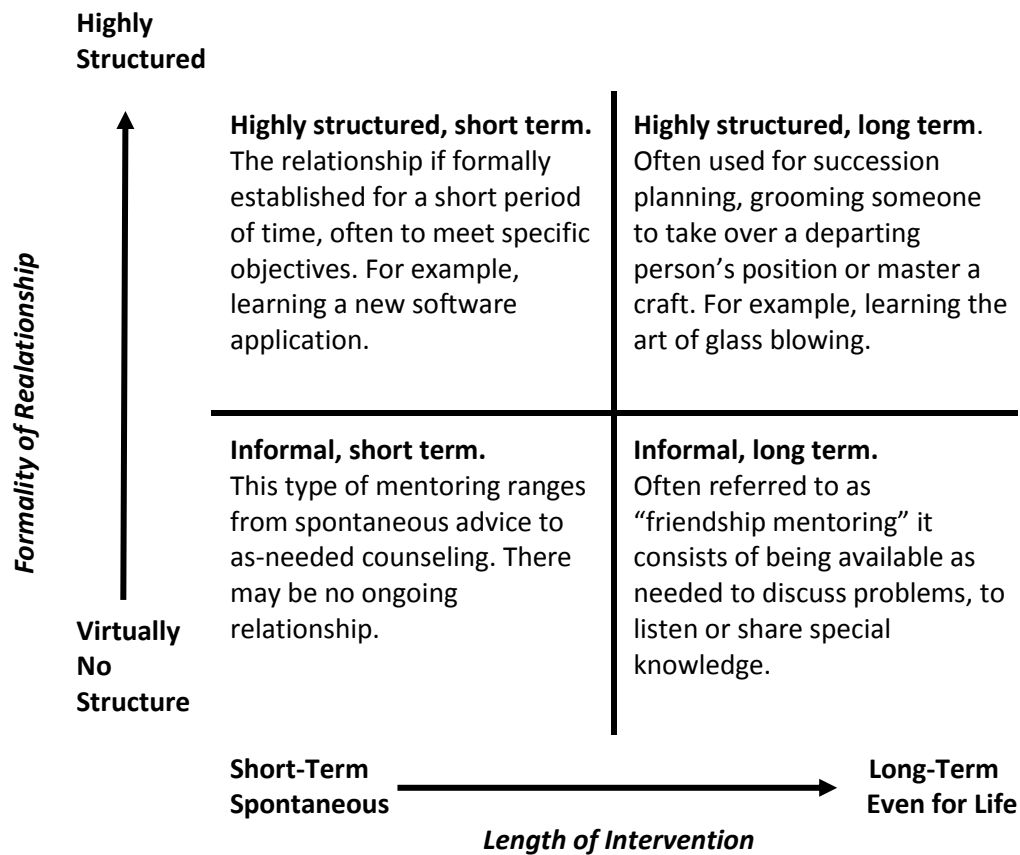
Believe in your ability to mentor.

Make a list – preparing for your first meeting make a list of things that you would have wanted to know when you were in the position of the student you will be mentoring. List should include information about yourself (as the mentor) about the organization you work for and your position there, expectations concerning the mentor-mentee relationship.

Create an agenda to include: 1. Getting to know each other, 2. Logistics, 3. Goals and expectations, 4. Concerns that might interfere with meeting again, 5. Initial impressions, 6. Questions to ask the mentee, 7. Why you think you can be a worthy mentor etc.

Source: (http://www.usyd.edu.au/riap/documents/wiisa/WISAMentorshipProgram_002.pdf)

Types of Mentoring Relationships-Mentee



Adapted from: Shea, Gordon, *Mentoring*, 2002

Mentoring can take the form of one-time intervention or a lifelong partnership. It can be as formal as a structured employee orientation or as informal as an element of a professional friendship. We have all had these experiences, both as a mentor and a mentee. Please Use this worksheet and describe one relationship you have experienced or observed for each of the four categories shown.

Highly structured, short term _____

Highly structured, long term _____

Informal, short term _____

Informal, long term _____

Mentee Expectations

Use this worksheet to develop an understanding of what you expect to gain from your mentoring relationships. By clarifying your own expectations, you will be able to communicate them more effectively to your mentors. Add items you deem important.

The reasons I want to be mentored are to:

- Receive encouragement and support
- Increase my confidence when dealing with professionals
- Challenge myself to achieve new goals and explore alternatives
- Gain a realistic perspective of the field
- Get advice on how to balance work and other responsibilities, and set priorities
- Gain knowledge of “dos and don’ts”
- Learn how to operate in a network of talented peers
- Other _____

I hope that my mentor and I will:

- Tour my mentor’s workplace
- Meet over coffee, lunch, or dinner
- Go to educational events such as lectures, conferences, or other events together
- Go to local, regional, and national professional meetings together
- Other _____

I hope that my mentor and I will discuss:

- Professional development subjects that will benefit my future career
- Career options and job search preparation
- The realities of the workplace
- My mentor’s work
- Technical and related field issues
- How to network
- How to balance work and family life
- Personal goals and life circumstances
- Other _____

The things I feel are off limits in my mentoring relationship include:

- Disclosing our conversations to others
- Using non-public places for meetings
- Sharing intimate aspects of our lives
- Meeting behind closed doors
- Other _____

I hope that my mentor will help me with job opportunities by:

- Opening doors for me to job possibilities
- Introducing me to people who might be interested in hiring me
- Helping me practice for job interviews
- Suggesting potential work contacts for me to pursue on my own
- Teaching me about networking
- Critiquing my resume
- Other _____

The amount of time I can spend with my mentor is likely to be, on average:

1 2 3 4 hours each *week/every other week/per month* (circle one)

Trust Building Behaviors

Trust-Building Behaviors	Trust-Lessening Behaviors
Encourages	Discourages people, put-down
Help others	Remain aloof or uninvolved
Listens	Ignores
Shares (thoughts, opinions, ideas)	Hides thoughts and feelings
Speaks frankly and directly	Indirect, vague, or devious in conversation
Consistent	Erratic or unpredictable
Cooperates	Competes, stresses winning
Acts an equal	Acts superior
Accentuates the positive	Emphasize deficiencies and negatives
Acts calmly under stress	Explodes, overreacts
Act spontaneously and authentically	Strategizing, manipulative
Offers empathy	Acts indifferent, cold
Fair and accurate	Evaluative and judgmental
Freeing and allowing	Controlling
Caring	Unconcerned
Friendly, smile	Standoffish, uninvolved
Accepts and tolerates	Criticizes, judges
Transparent, open, above-board	Covert, underhanded, sneaky
Open to new ideas and information	Close-minded, opinionated
Verbal-nonverbal congruency	Actions differ from words
Resolves conflicts	Threatens, punishes, acts vindictive
Empowers and builds people up	Cut others down, insults, ridicules
Treats people as individuals	Categorizes, stereotypes

Listening is Never Easy!

Mentee Exercise

- 1 Think of someone you know who doesn't seem to listen to you. What does this person do to let you know h/she isn't listening?
- 2 How do you feel when talking to this person?
- 3 Think of a person who listens to you well. What do they do?
- 4 How do you feel when talking to this person?
- 5 Think of a time when you didn't listen effectively. What happened?
- 6 Think of a time when you did listen effectively. What happened?

What Would You Do? Mentee

Here's an actual scenario faced by a mentee perhaps similar to you. Read the facts, imagine yourself in the situation, and choose your preferred solution...or develop your own! Check here to see how your solution compares to the answer suggested by The Mentoring Group.

Possible Scenario

After an exhausting day you check your answering machine and are shocked to receive an irritated message from your formal mentor: "I'm pretty tired of this. I've put more than enough work into trying to mentor you and, quite frankly, I've had it! As far as I'm concerned, we're finished." Your mind races as you try to determine what you did (or didn't do.) In fact, you thought the relationship was going well, and you've certainly received a lot from your sessions. It's Friday night and you've never asked if you could call your mentor on the weekend. What do you do?

- A.** You decide to sleep on it for the weekend. Monday you'll check with your program's mentoring coordinator to see what to do.
- B.** You have his/her home phone number and decide to risk the call. Before you call, you practice a number of possible responses on your part.
- C.** You pretend you never got the message. You hope he/she was just having a bad day. On Monday, you place a cheerful and appreciative call to the mentor suggesting your next get-together.
- D.** You do nothing and accept this as the end of the partnership. You had a feeling this relationship wouldn't last long and think maybe the mentor was looking for an excuse.

Suggested Response

We vote for **A** (waiting, thinking, and checking with an expert). One of the benefits of formal programs is the availability with an experienced support person. You can be frank with the coordinator and see what your options are. He/she may have additional information you don't have. Our bias is that you try to salvage the relationship (if it makes sense to do so) or at least have a closure meeting to discuss what worked and what didn't.

- B.** (practicing, then calling the mentor) You run the risk of irritating the mentor further (since you've never talked on the weekend and because you're feeling a little stressed). If you insist on trying, you perhaps will be fortunate and get the mentor's voicemail. You might leave a short message saying how you're anxious to talk, you've gained so much, want to find out how you've disappointed him/her, etc.
- C.** (pretending all is well) Well, aren't you gutsy? Lying usually gets us into trouble, so we veto this very risky ploy.
- D.** (letting this end the relationship) This is tempting, no doubt, and may seem the best idea in the short run. However, you've been enjoying the relationship, it could very well be salvageable, and like all of us, you could use practice in handling difficult conflicts.

Source: The Mentoring Group, www.mentoringgroup.com

Mentee's Strategies for an Effective Mentoring Conversation

Activities	Mentor's Job	Mentee's Job
Come prepared	Learn whatever you can about your mentee before your initial meeting.	Learn whatever you can about your mentor before your initial meeting.
Talk about the big picture	Recount your own mentoring experiences to your mentee. Explain what worked and what didn't.	Listen and ask questions.
Discuss the mentee's needs	Ask questions and listen.	Explain where you are and where you would like to be...and how mentoring might help.
Seek mutual agreement on goals and expectations	Explain what you can and what you cannot do.	"This is what I hope to achieve through this mentoring relationship."
Seek agreement on responsibilities	"I will do_____."	"And I agree to do_____."
Set a timetable	"Let's work on this for one month. Then we'll review progress and determine if we should continue."	Same
Agree on meeting times and who will set them	Provide days and times that work for the mentee.	"I will take responsibility for finding dates and times that also fit into your schedule."
Insist on confidentiality	"Nothing we discuss will go outside this room unless we both agree otherwise."	Same
Agree to be candid	"If this relationship isn't producing the results you expect, or if you disagree with my advice, say so. Neither of us has time to waste."	"I will tell you if this relationship isn't working for me. I won't waste your time."

Source: (Coaching and Mentoring , 2004)

Planning for First Meeting: A Mentee's Checklist

Use this checklist to plan initial meetings with your mentors in light of what you hope to achieve over the long term.

- ___ Arrange your first meeting with a prospective mentor.
- ___ Explain your goals for meetings and ask how confidentiality should be handled.
- ___ Discuss with your mentor what you both perceive as the boundaries of the mentoring relationship.
- ___ Review the current experience and qualifications. Record these on a mentoring action plan worksheet.
- ___ Discuss and record your immediate and long-term goals. Explore useful professional development experiences in view of these goals. Discuss options and target dates.
- ___ Discuss and record any issues that may affect the mentoring relationship such as time, financial constraints, lack of confidence, or newness to the role, etc.
- ___ Arrange a meeting schedule with your mentor (try to meet at least once a quarter). Record topics discussed and feedback given at each meeting. Request that meeting records be kept confidential.
- ___ Discuss with your mentor the following activities that can form part of your mentoring relationship:
 - Getting advice on strategies for improving skill development.
 - Organizing observation(s) of your networking skills with constructive feedback.
 - Organizing a session of work shadowing of a fellow professional.
 - Getting advice on issues or concerns with colleagues or clients.
 - Receiving feedback from other sources
- ___ Create a mentoring action plan that reflects different professional development needs at different stages of your career.
- ___ Encourage your mentor to reflect regularly with you on your goals, achievements, and areas for improvement. Consider compose a brief reflection essay (e.g., 1/2 page) prior to each meeting.
- ___ Amend your mentoring action plan as needed by focusing on your developing needs.

Adapted from: Mentoring towards excellence: Section 4: Handbook and guidelines for mentors and mentees. Association of Colleges and the Further Education National Training Organization, Learning and Skills Council: Coventry, England.

Sample Completed Mentoring Partnership Agreement

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

- To develop a leadership career pathway to prepare the mentee to assume a significant high-profile leadership position within the community
- To assist mentee in depth analysis of leadership strengths and weaknesses
- To create a leadership development plan for mentee
- To introduce mentee to best-practice leadership experiences

We have discussed the protocols by which we will work together, develop, and, in that same spirit of partnership, collaborate on the development of a work plan. In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly.

Our specific schedule of contact and meetings, including additional meetings, is as follows:
We will meet twice a month and be in contact by telephone or e-mail at least once a week.

2. Look for multiple opportunities and experiences to enhance the mentee's learning.

We have identified, and will commit to, the following specific opportunities and venues for learning:
Mentee will attend board meetings as mentor's guest. We will meet prior to each meeting and debrief following each meeting.
Mentee will attend a nonprofit institute with mentor.
Mentee and mentor will attend community leadership forum meetings.

3. Maintain confidentiality of our relationship.

Confidentiality for us means that what we discuss remains between us. Mentor and mentee will agree ahead of time if specific information is to be shared with anyone else.

4. Honor the ground rules we have developed for the relationship.

Our ground rules will be: We will meet after business hours. Mentee will assume responsibility for confirming meetings. Mentee will pay for own expenses. Mentee will maintain an ongoing journal of mentoring experience. At the conclusion of each meeting, we will target topics for discussion at the next session.

5. Provide regular feedback to each other and evaluate progress. We will accomplish this by:

Reviewing learning goals once a month, discussing progress, and checking in with each other regularly for the first month to make sure our individual needs are being met in the relationship, and periodically thereafter.

We agree to meet regularly until we have accomplished our predefined goals or for a maximum of eighteen months. At the end of this period of time, we will review this agreement, evaluate our progress, and reach a learning conclusion. The relationship then will be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated the mutually agreed-on goals.

In the event one of us believes it is no longer productive for us to continue or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event we agree to use closure as a learning opportunity.

Mentor's Signature and Date

Mentee's Signature and Date

Template Mentoring Partnership Agreement

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

We have discussed the protocols by which we will work together in partnership and collaborate on the development of a work plan. In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly.

We agree that our specific schedule of contact and meeting, including additional meetings, is as follows: _____

2. Look for multiple opportunities and experiences to enhance the mentee's learning.

We agree to the following specific opportunities and venues for learning:

3. Maintain confidentiality of our relationship.

We agree that confidentiality encompasses:

4. Honour the ground rules we have developed for the relationship.

We agree the ground rules as:

5. Provide regular feedback to each other and evaluate progress.

We agree to accomplish this by:

We agree to meet regularly until we accomplish our predefined goals or for a maximum of [specify timeframe]. _____ At the end of this time, we will review this Agreement, evaluate our progress and reach a learning conclusion. Once we have agreed on this, the relationship will be considered complete.

However, if we choose to continue the mentoring partnership, we may negotiate a basis for continuation, as long as we have stipulated mutually agreed terms and goals.

In the event that one of us believes the relationship is no longer productive or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event, we agree to use closure as a learning opportunity.

Mentor's signature

Mentee's Signature

Date: _____

Date: _____

Personal Vision Statement Worksheet

These are the main things that motivate me and bring me personal and professional satisfaction:

My greatest strengths/abilities/traits/things I do best:

At least two things I can start doing/do more often that use my strengths, etc.:

This is my **Personal Vision Statement** (in 50 words or less):

The Brainstorming Exercise: Professional Development Goals

In the space below, write down all areas that you could improve in your professional life.
While reviewing this, make use of the questions below to help you:

- 1) What are your current resources and what skill do you want to pick up?
- 2) What are your personal weaknesses? What character traits do you want to develop?
- 3) Are you happy with your networking circle? If no, what do you want to improve on it?
- 4) What would you really desire to happen in your life?

After writing all goals, give each a priority and a timeline.

Mentoring Action Plan Worksheet

Name: _____

Date: _____

Career Goal: _____

Knowledge to Gain/Skills to Build/Attitudes to Develop to Accomplish my Career Goal. <i>(What must I acquire/improve?)</i>	Projected Outcome <i>(How will I know I did it?)</i>	Action Steps <i>(How will I actually gain/build/develop these?)</i>	Resources Needed <i>(Besides the help of my mentor, I will need what?)</i>	Target Completion Date <i>(When will I be there?)</i>

Tips for Mentees

Contact your mentor initially via e-mail or telephone.

Plan a face-to-face meeting with your mentor as soon as possible, you can keep in contact via email, this is perfectly acceptable, although it would be good to have some face-to-face contact occasionally, as time permits.

Initiate meeting with mentor at least once a month.

Take responsibility for structuring a preliminary list of what is discussed at those meetings.

At the beginning of the relationship, communicate clearly and negotiate with your mentor your goals for your time together.

Invest time in learning about the mentor's organization and professional roles and responsibilities.

Honor any commitments made to the mentor and respect the basic privacy and confidentiality inherent in the communication that occurs within the relationship.

Actively request information and counsel from the mentor on a periodic basis and communicate with the mentor as to how the advice or information was used.

Accept that the relationship is temporary, but be alert for the possibility that it may exceed for a longer time frame, this should be a mutual agreement as to how you wish to proceed.

Express your appreciation for the mentor's time, information, counsel, and sharing of opportunities with you.

Be punctual and prepared. Don't prevail upon your mentors for special privileges which include not attending or leaving early.

Dress appropriately for all meetings with mentors.

Enter relationship with a positive attitude – believe in achievement and have confidence in yourself.

Source:(http://www.usyd.edu.au/riap/documents/wiisa/WIISAMentorshipProgram_002.pdf)

Periodic Mentoring Partnership Review

Over time the nature of the mentoring relationship may alter and support needs could change. Therefore it is valuable for a mentor and mentee, **together**, to review the process of the relationship at appropriate points and make any adjustments as necessary to the way they work together and the type of support provided.

As you sit down together, here is a list of some questions that might be useful in this process:

- How is the mentoring partnership working?
- What is working well?
- What, if anything, is working not as well as you had hoped?
- What are you both gaining from your experience of the process?
- What does your mentee appreciate about the support the mentor is providing?
- What additional support might the mentee welcome?
- What external constraints or difficulties are affecting the partnership? How might these be resolved?
- What changes might be helpful to make in the way the program or either party operates within its expectations?

Mentee Role Self-Assessment

Mentee, here is an opportunity to assess yourself on the six factors discussed during your training on evaluating your mentoring partnership. Take a few minutes and try to rate yourself as you *actually are*, not as you'd like to be. A similar self-check will be provided to your mentor. If it feels comfortable, invite him or her to complete the mentor version, and discuss your findings in your next mentoring meeting.

Directions: For each item, rate yourself as follows:

1 = Strongly disagree

2 = Disagree

3 = Agree

4 = Strongly agree

Purpose

- This mentoring relationship is a high priority for me.
- Finding my mentor was an important step for me.
- Being a responsible mentee is key to the success of this partnership.
- I've been clear with my mentor on why I want to meet with him/her.
- I've proposed one or more goals to work on with the help of my mentor.
- I'll recognize when I've reached my goal(s).
- I feel good about the focus of this relationship and what I'm doing in it.
- This relationship is a good use of my time.
- From time to time I check in to see if we should change our focus in some way.
- Once I've accomplished my goal(s), I'm willing to see the relationship refocus or perhaps end for the time being.

Total points for Purpose: _____

Communication

- I communicate in the ways we agreed.
- I get back to my mentor in the timeframe we agreed.
- The communication between us adds up to at least one or two hours a month.
- I don't communicate more often than we agreed unless it's a special circumstance.
- I'm an effective listener and remember what my mentor tells me.
- I ask appropriate questions.
- I share adequate information about myself.
- I monitor my nonverbal language to be sure it's conveying what I want it to.
- I invite my mentor to give me suggestions for how I can communicate better.
- As soon as possible, I try out my mentor's suggestions on communication.

Total points for Communication: _____

Trust

- I've talked about the topics of trust and confidentiality with my mentor.
- I'm beginning to trust my mentor more and more.
- I'm becoming less guarded than when we first got together.
- I share important information about myself with my mentor.
- My mentor seems to be trusting me more and more.
- I welcome and keep in confidence the information he/she shares with me.
- My mentor can count on me to be honest.
- He/She can count on me to follow through on my promises.
- I avoid any trust-breaking behaviors such as canceling appointments without compelling reasons, talking negatively about others, or making excuses about why I don't follow through.
- I'm willing to forgive some mistakes my mentor makes because my trust in him/her is strong.

Total points for Trust: _____

Process

- I take responsibility for scheduling our meetings.
- I like all or most of our meeting locations.
- I've checked to be sure my mentor likes our meeting locations.
- I like the length of our get-togethers.
- I've checked to be sure my mentor likes the length of our get-togethers.
- I'm satisfied with the way we conduct our meetings.
- I've checked to be sure my mentor is satisfied with how we conduct our meetings.
- I'm aware of the four stages of formal mentoring.
- I'm helping us move through those four stages.
- I've checked to see if my mentor likes the style and frequency of our communication.

Total points for Process: _____

Progress

- I'm working on one or more measurable goals with the help of my mentor.
- I make it easy for my mentor to help me develop.
- I take the lead on identifying interesting learning experiences I can try.
- I welcome my mentor's suggestions of learning experiences for me.
- I do at least one learning activity in between our mentoring meetings even if that takes me 2-4 hours
- I report the results of my learning to my mentor.
- I've made significant progress toward my goal(s) since starting to meet with my mentor.
- I'm making notable progress in my ability to be mentored.
- My mentor knows and is satisfied with my progress.
- I/we celebrate my progress.

Total points for Progress: _____

Feedback

- ___ I told my mentor how and how often I want positive feedback.
- ___ I receive the right amount of positive feedback from my mentor.
- ___ I told my mentor the way I'd like to receive corrective feedback.
- ___ I continue to ask my mentor for corrective feedback.
- ___ When I receive positive feedback, I express my thanks.
- ___ When I receive positive feedback, I use the information to reinforce my habits.
- ___ When I receive corrective feedback, I'm usually non-defensive.
- ___ When I receive corrective feedback, I take immediate steps to apply it.
- ___ I remember to give my mentor positive feedback about his/her mentoring and other assistance.
- ___ (If agreed upon) I give my mentor suggestions for improvement.

Total points for Feedback: _____

Total points for all six factors: _____

Scoring: Add up your points for each factor, and then total all your points.

161-240 points: You seem to be a committed, effective mentee. Check this out with your mentor to be sure your assessment is accurate in his/her eyes. Continue to enjoy mentoring and continue to polish your skills.

81-160 points: You're doing many things right as a mentee. Talk with your mentor to see if your assessment is accurate and if he/she has suggestions for improvement. Try to supplement or otherwise improve your performance on any items that you rated low.

80 or fewer points: It's admirable that you took this assessment and want to improve as a mentee. You may be harder on yourself than you need to be. Talk with your mentor to see if he/she will give you honest feedback on what you're doing right and what you could improve. Try to add a few new effective behaviors over the coming months.

Mentor Role Self-Assessment

Mentor, here is an opportunity to assess yourself on the six factors discussed during your training on evaluating your mentoring partnership. Take a few minutes and try to rate yourself as you *actually are*, not as you'd like to be. Consider sharing the results with one of your own mentors. You may or may not wish to share the results with your mentee; that's up to you.

A similar role self-check is provided to your mentee. In fact, your mentee may choose to show you his/her assessment and ask for your opinion of its accuracy. The two of you could use either assessment as a tool for talking about the nature and quality of your relationship and how it could be even better.

Directions: For each item, rate yourself as follows:

1 = Strongly disagree

2 = Disagree

3 = Agree

4 = Strongly agree

Purpose

- This mentoring relationship is a high priority for me.
- Finding mentees/being a responsible mentor is one of the most important steps I can take in this relationship.
- I've asked my mentee to clarify why he/she wants to meet with me.
- I've asked my mentee to propose one or more goals to work on in this relationship.
- My mentee and I are clear on how we'll recognize when he's/she's reached the goal(s).
- I feel good about the focus of this relationship and what I'm doing in it.
- This relationship is a good use of my time.
- From time to time I check in to see if we should change our focus in some way.
- Once my mentee has accomplished his/her goal(s), I'm willing to see the relationship shift focus or perhaps end for the time being.

Total points for Purpose: _____

Communication

- I communicate in the ways (in person, phone, email, mail) we agreed.
- I get back to my mentee within the timeframe we agreed.
- The communication between us adds up to at least one or two hours a month.
- Occasionally, I spontaneously contact my mentee just to say hello or pass on some information.
- I'm an effective listener and remember what my mentee tells me.
- I ask appropriate questions.
- I share appropriate information about myself.
- I monitor my nonverbal language to be sure it's conveying what I want it to.
- I give my mentee suggestions for how he/she can communicate better.
- I work on being a better communicator.

Total points for Communication: _____

Trust

- I've talked about the topics of trust and confidentiality with my mentee.
- I'm beginning to trust my mentee more and more.
- I'm becoming less guarded than when we first got together.
- I share important information about me with my mentee.
- My mentee seems to be trusting me more and more.
- I welcome and keep in confidence the information he/she shares with me.
- My mentee can count on me to be honest.
- He/She can count on me to follow through on my promises.
- I avoid any trust-breaking behaviors such as canceling appointments without compelling reasons, talking negatively about others, or making excuses about why I don't follow through.
- I'm willing to forgive some mistakes my mentee makes because my trust in him/her is strong.

Total points for Trust: _____

Process

- I ask my mentee to take responsibility for scheduling our meetings.
- I like all or most of our meeting locations.
- I've checked to be sure my mentee likes our meeting locations.
- I like the length of our get-togethers.
- I've checked to be sure my mentee likes the length of our get-togethers.
- I'm satisfied with the way we conduct our meetings.
- I've checked to be sure my mentee is satisfied with how we conduct our meetings.
- I'm aware of the four stages of formal mentoring.
- I'm helping us move through these four stages.
- I've checked to see if my mentee likes the style and frequency of our communications.

Total points for Process: _____

Progress

- My mentee has one or more specific goal(s) to work on with my help.
- I make it easy for my mentee to ask for help.
- I ask my mentee to take the lead on identifying interesting learning experiences to try.
- I sometimes suggest learning experiences for my mentee.
- I ask my mentee do at least one learning activity in between our mentoring meetings.
- I ask for the results of his/her learning and discuss it with him/her.
- Since starting to meet with me, my mentee has made significant progress toward goal(s).
- I'm making notable progress in my ability to mentor.
- I'm helping my mentee learn more about being an effective mentee.
- I help my mentee celebrate their/our progress.

Total points for Progress: _____

Feedback

- ___ I asked my mentee how and how often he/she wants positive feedback.
- ___ I provide enough positive feedback to my mentee.
- ___ I asked my mentee how he/she wants corrective feedback.
- ___ I give my mentee positive feedback about his/her actions and personal qualities
- ___ I give my mentee enough corrective feedback.
- ___ I graciously receive positive feedback from my mentee.
- ___ I encourage my mentee to show appreciation to me and other helpers.
- ___ I asked my mentee to give me corrective feedback about my mentoring efforts.
- ___ When I receive corrective feedback from my mentee, I'm usually non-defensive.
- ___ When I receive corrective feedback from my mentee, I take immediate steps to apply it.

Total points for Feedback: _____

Total points for all six factors: _____

Scoring: Add up your points for each factor, and then total all your points.

161-240 points: You seem to be a committed, effective mentor. Check this out with other mentors you admire and/or with your mentee to be sure your assessment is accurate. Continue to enjoy mentoring and continue to polish your skills.

81-160 points: You're doing many things right as a mentor. Talk with someone even more experienced in formal mentoring to see if your assessment is accurate and if he/she has suggestions for improvement. Try to add or improve your performance on any items that you rated low.

80 or fewer points: It's admirable that you took this assessment and want to improve as a mentor. You may be harder on yourself than you need to be. Talk with your own mentor or someone more knowledgeable about formal mentoring to see if he/she will give you honest feedback on what you're doing right and what you could improve. Try to add a few new effective behaviors over the coming months.

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MASTERFUL MENTORING



Triple Creek's Mentoring Newsletter

July 2004

Creators of Open Mentoring™

TIPS

Mentee Tip of the Month

Visualize your goals so you have a clear picture of what success looks like.

Mentor Tip of the Month

Try to find out if your mentee learns best through seeing, hearing, discussing or doing.

THE FIRST MEETING



Tips for starting off right.

Many people experience anxiety about their first meeting with a mentoring partner. Having a clear game plan will relieve this anxiety and make that first meeting more productive.

A major purpose of this first meeting is to get your mentoring relationship off to a good start by candidly sharing your goals, experiences and expectations. Use the mentoring agreement (discussed in last month's issue) during your first meeting to help you focus your discussion on these critical areas.

How you relate to your partner may be even more important than the material you cover. In our experience, expressing a genuine interest in your partner is the most critical goal. This interest is expressed by asking thoughtful, engaging questions. You also express this interest by listening carefully to your partner's comments and responses to questions you ask him/her. Learning about your partner's interests, work activities, duties and personality can help you establish a solid foundation upon which to build your relationship.

Prepare for your first meeting by generating a list of both general and specific questions you want to ask. The following are some general questions you can ask your mentoring partner. Don't let these suggestions limit your imagination when it comes to creating your own questions to help you learn about your new mentoring partner.

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THE FIRST MEETING (continued)

Mentees can ask:

- What should I know about you that I would not learn from your biography?
- What are your concerns as we move forward in our mentoring relationship?
- How do you foresee this relationship working?
- How do you feel about me, as the mentee, driving this relationship?
- What challenges might we face in our relationship?
- How should we address any challenges that arise?
- What are your thoughts about my development goals?
- What do you value in a working relationship?

Mentors can ask:

- What are your concerns as we move forward in our mentoring relationship?
- What are your expectations of me as a mentor?
- What are your expectations of yourself?
- What should I know about you that I would not learn from your mentoring agreement?
- What challenges might we face in your development?
- How should we address any challenges that arise?
- What are your interests, hobbies, etc.?
- What do you value in a working relationship?

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THE FIRST MEETING (continued)

Remember, a successful mentoring relationship offers something for both you and your mentoring partner. Try to have a good understanding of what you want to get from the relationship before you speak with your partner. Also, try to identify what you might be able to bring to the relationship, making this part of your conversation. Making an effort toward creating a positive first meeting with your mentoring partner will in turn help you create a positive mentoring relationship in the long run.

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LEVELS OF MENTORING

Finding the right fit.

While universal in practice, mentoring is not uniform in application. One variation is the level of mentoring at which the participants engage. There are three levels of mentoring, as shown in the Mentoring Levels™ model created by Triple Creek Associates. These levels are information, skill and advocacy, and each incorporates various degrees of accountability, intensity and trust for which both parties are responsible.

The Mentoring Levels™ model is based on a continuum. This continuum starts with a form of mentoring that requires a less demanding relationship (Information) and moves toward a form of mentoring that is quite demanding (Advocacy). At each point in the continuum, the degree of accountability, intensity and trust shifts.

- **Accountability** – This is the fuel that drives any effective mentoring relationship. It encourages deliberate planning, keeping agreements, and honestly assessing one another's actions and attitudes. This level of honesty can keep the learning relationship focused and serious.
- **Intensity** – Intensity involves a deliberate, intentional and heightened degree of concern that supports the mentoring relationship. Matched levels of intensity are needed from both parties to keep the interest and involvement in the mentoring process high.
- **Trust** – This is the confidence both parties need in each other's character, ability, strength, maturity and truthfulness in the relationship. Mentoring is a mutual process. Trust has to be evident to both parties for the relationship to be productive.





LEVELS OF MENTORING (CONTINUED)

Three Levels of Mentoring

With a firm understanding of accountability, intensity and trust, mentees and mentors can begin to decide which of the three levels of mentoring will best suit their needs.

Information

At this level of mentoring, mentees simply need information or understanding about a particular aspect of their work lives. Mentors share experiences and techniques that they think will meet the mentees' immediate needs. Information mentoring suggests a lower level of relationship accountability, intensity and trust. This type of mentoring is also less deliberate and involves less forethought and planning. Mentors perform three basic functions through information mentoring.

- They act as **resources**, providing information based on the mentees' needs.
- They act as **advisors**, becoming a reliable living source of instruction.
- They **enlighten** by illustrating and bringing understanding to mentees based on their needs.

Skill

The second level of mentoring is skill-based mentoring. In this level of mentoring, mentees need to develop a specific skill. Mentors make themselves available to handle questions, consult on techniques, point out potential difficulties, set expectations, and report on how they have done it in the past. Skill-based mentoring suggests a moderate amount of accountability, intensity and trust. It is also more deliberate and involves more forethought and planning than

MENTORING TIPS OF THE MONTH

Mentee
Communicate your expectations of relational commitment to your mentor and invite his/her response and suggestions.

Mentor
Ask your mentee what s/he needs from you relationally to accomplish the goals set forth for the mentoring relationship.



LEVELS OF MENTORING (CONTINUED)

information-based mentoring. Through skill-based mentoring, mentors perform three basic roles.

- They act as **teachers**, using on-the-job training methods to instruct mentees in specific skill development areas.
- They act as **coaches**, providing first-hand feedback on current performance.
- They act as **role models**, becoming living examples while mentees pursue specific areas of skill development.

Advocacy

The last level of mentoring is advocacy. In this level of mentoring, mentees need to focus on highly complex interpersonal behaviors. Mentors, although never taking responsibility for future successes, become guiding influences, helping mentees develop the most effective behaviors for various situations. Mentors assess what abilities mentees possess and help them plan appropriate learning and development activities. Mentors also observe and provide feedback on mentees' performances. This level of mentoring suggests a high level of accountability, intensity and trust. Advocacy-based mentoring is very deliberate and involves high levels of forethought or planning. In this type of mentoring, mentors perform three basic tasks.

- They act as **guides**, helping mentees navigate through the personal development process.
- They act as **consultants**, becoming sounding boards and guiding mentees while they develop specific behaviors and abilities.
- They act as **sponsors**, advocating mentees' recognition and promotion.

WE WANT YOUR STORIES!

Do you have a mentoring story you'd like to share with us and our readers?

We want to hear from you!

Send your mentoring stories to us at info@3creek.com and you may see your tale in an upcoming issue of *Masterful Mentoring*.

Masterful Mentoring

Feb. 2005

Triple Creek's Mentoring Newsletter

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LEVELS OF MENTORING (CONTINUED)

Clearly, the three levels of mentoring differ in their tasks, roles and approaches. Yet even with these variances, each remains a viable solution for meeting mentoring needs, especially considering how wide the range of mentees is and the goals and development needs they bring with them. No matter who a person is or what he/she wishes to accomplish, a level of mentoring exists that is the perfect fit – and a mentor exists who is the perfect match. This model helps clarify the relational commitment expectations between you and your mentoring partner, which in turn helps you find a partner who is right for you.



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MASTERFUL MENTORING



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TIPS

Mentee Tip of the Month

Identify the critical path to achieving your goals and then resolve to stick to it.

Mentor Tip of the Month

Use journalistic questions to check for clarity around expectations: who, what, where, when, why and how.

MENTORING AGREEMENTS



Creating the foundation for your mentoring relationship.

Establishing the groundwork for your mentoring relationship is a key element for success. You give yourself

and your mentoring partner an advantage by creating a mentoring agreement at the beginning of the relationship, which provides a concrete foundation for what each wishes to accomplish through the mentoring relationship. It also helps you both manage relational expectations and clearly define your commitments. A good agreement provides the framework for the scope of the relationship and acts as a contract between the mentee and mentor.

The process of negotiating this agreement should be seen as a constructive dialogue between the mentoring partners. The mentee should create the first draft of the mentoring agreement before ever meeting with or speaking to the mentor. By creating the agreement before meeting with the mentor, the mentee proactively begins to take the relationship into his/her own hands and forms a better understanding of exactly what it is s/he wants to learn.

Even though the mentee creates the *original* version of the agreement, the mentor will give constructive feedback and input to the final draft of the agreement with the mentee so that each feels responsible for the finished product. Both parties must be involved in refining and ratifying the mentoring agreement, since both will be held accountable to it.

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MENTORING AGREEMENTS (continued)

Several factors should be covered in a mentoring agreement:

- The mentee's learning needs and development goals.
- Ways the mentee will be held accountable for his/her development (both by himself/herself and the mentor).
- Areas of the relationship that the mentee and/or mentor want to remain confidential.
- An ideal schedule for meeting.
- Ways for both the mentee and mentor to monitor progress.

The mentee and mentor will work together on the final draft of the agreement. Based on the essential elements of a mentoring agreement, **mentees** should keep the following questions in mind when negotiating the final agreement.

- Can my mentor help me meet these goals?
- How will I be held accountable for my progress?
- Do these confidentiality standards meet both of our needs?
- Will this meeting schedule work for me?
- How can we both monitor my progress?

Based on the essential elements of the mentoring agreement, **mentors** should consider asking the following questions of the mentee's proposed agreement.

- Can I help my mentee meet these goals?
- Are there additional ways I can help my mentee retain accountability for his/her progress?
- Do these confidentiality standards meet both of our needs?
- Will this meeting schedule work for me?
- How can the mentee and I both monitor his/her progress?

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MENTORING AGREEMENTS (continued)

By asking these questions of the mentoring agreement and using the agreement as the foundation for your mentoring relationship, you can better address any relational components that may arise during the relationship, such as misunderstandings, personality conflicts and unmet expectations. Additionally, the mentoring agreement will help you stay focused as you handle the intangible qualities of the mentoring relationship. With this groundwork laid, you will be able to focus your energy and time toward more important matters: actually engaging in mentoring.

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TIPS

Mentee Tip of the Month

Track your time for one week to see how you spend it.

Mentor Tip of the Month

Offer suggestions on ways to evaluate the effectiveness of action plans.

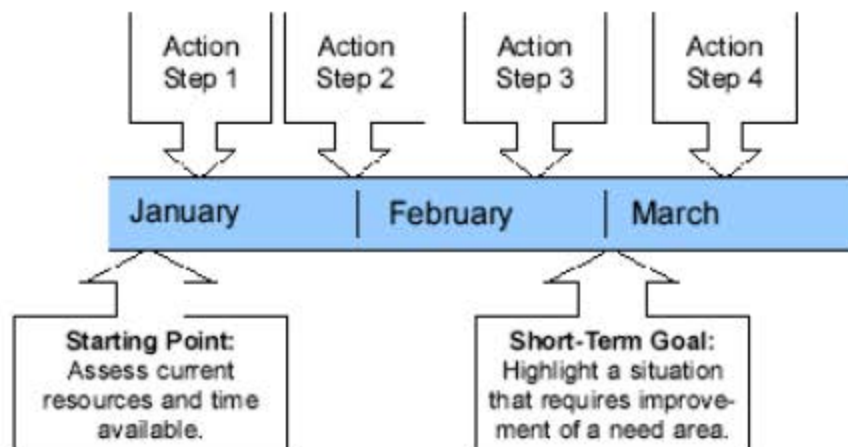
CREATING PRACTICAL ACTION PLANS

A 4-step guideline for success.

In order to maximize the effectiveness of mentoring relationships, specific goals and action plans are needed. Last month, we looked at writing effective goals, the basis for which action can then be taken. This month, we concentrate on forming action plans so that goals can be implemented and achieved.

The action planning process moves from general need descriptions to specific time-bound action steps. It also begins with an end result in mind and moves backward to the construction of specific steps to achieve that result.

Action Planning Process





CREATING PRACTICAL ACTION PLANS (continued)

Action Plan Guidelines and Example

1. In general, it is best to focus on only one or two critical issues at a time in mentoring relationships. Quality work on a few critical areas will produce more lasting results than limited work on numerous areas.
2. Select a particular learning need or goal area.
Example: Improve communication.
3. Identify one key result or outcome that would have the most impact on your effectiveness.
Example: Improving my verbal and visual presentation skills.
4. Identify possible activities or projects that fall within time and resource boundaries, and draft a short-term action plan.
Example: If my next critical presentation falls on March 1, a short-term action plan might be:
 - a. *Step 1:* I will study "Effective Presentation Basics" by 1/1.
 - b. *Step 2:* I will implement what I have read when preparing an outline and slides for my next presentation by 2/1.
 - c. *Step 3:* I will meet with my mentor, practice the presentation, and get her feedback by 2/15.
 - d. *Short-Term Goal:* I will revise my presentation based on my mentor's feedback and give the presentation on 3/1 based on what I have learned so far.
 - e. *Step 4:* I will meet with my mentor on 3/15 to debrief and formulate the next action plan.



CREATING PRACTICAL ACTION PLANS (continued)

Consider these questions when setting goals and short-term action plans:

- What do you hope to achieve within the next 12 months?
- How can you get paid for doing what you love?
- What are your current skill and experience bases?
- What have you done previously to develop yourself?
- How does this development area tie into your job description, strategic initiatives or personal development plan?
- What are some potential benefits of developing yourself in this area?
- Where does this development area fit into your priorities?
- To whom else might your development be important (e.g., your team, department, customers, stakeholders, organization, family)?
- What other areas of your work would be impacted if you were to improve your skills in this area?

(continued on next page)

MASTERFUL MENTORING



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CREATING PRACTICAL ACTION PLANS (continued)

- What resources, people or otherwise, do you have access to that could help you in this development area (e.g., for frequent feedback or encouragement)?
- If you were to break this area down into skills and knowledge, what would be some of the most important aspects of what you want to learn?
- What level of skill do you need in this area (e.g., familiarity, passing a certification, recognition as an exemplary performer, ability to train others)?

(See the September issue of *Masterful Mentoring* for more on goal setting.)

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TIPS

Mentee Tip of the Month
Attempt to align your goals with those of the organization, if possible.

Mentor Tip of the Month
When suggesting activities, keep in mind the nature of the development task, its importance, time available, and the mentee's preferred learning style.

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WRITING EFFECTIVE GOALS

The *SMART* technique.



In order to maximize the effectiveness of mentoring relationships, specific goals and action plans are needed. Writing these goals and creating these action plans can often give mentees and mentors difficulty, particularly due to the pervasive nature of the goals and action plans to the entire

mentoring relationship. But they are tasks that must be completed. This month, we look at how to identify and write effective goals. Next month we will finish this topic by looking at how to transform general needs and goals into more specific action plans.

General Criteria for Setting Goals

Many companies use the acronym SMART for the goal setting process. Below are some of our suggestions based on this acronym.

S – *Specific and/or Simple*: The best goals are concisely stated and focus on a single end result.

M – *Measurable*: How will you track improvement in terms of time, cost, quality, impact, etc.? Focus on results that are measurable, not just on activities.

A – *Attainable*: Is the goal "doable" and achievable?

R – *Realistic and/or Relevant*: Is the goal consistent with your current priorities, current resources, and company strategies?

T – *Time-bound*: When will you complete the goal? What intermediate steps need deadlines in order for you to accomplish this goal?



WRITING EFFECTIVE GOALS (continued)

Consider these questions when setting goals:

- What do you hope to achieve within the next 3-5 years?
- To what degree are your goals capable of being measured?
- What concrete activities will you be able to do as a result of achieving your goals?
- What resources – people or otherwise – do you have access to that could help you meet these goals (e.g., for frequent feedback or encouragement)?
- If you were to break this goal down into skills and knowledge, what would be some of the most important aspects of what you want to learn?
- What level of skill do you need to achieve this goal (e.g., familiarity, passing a certification, recognition as an exemplary performer, ability to train others)?
- Is the timeline in your mentoring agreement reasonable for meeting these goals?



WRITING EFFECTIVE GOALS (continued)

Writing Your Goals

Once you have considered the previous questions, it is time to sit down and actually write your goals. When writing goals, start by defining what the goal is. This is done by describing what the results will be when the goal is accomplished. Use action verbs to make these goals more dynamic and effective. For example, a goal statement could read: "Complete Level 2 certification by year's end."

Suggested Action Verbs

advise	evaluate	organize
analyze	execute	participate
approve	facilitate	plan
assign	follow up	present
audit	forecast	produce
budget	formulate	provide
calculate	gather	recommend
check	give	reduce
collect	implement	review
compile	improve	report
complete	inform	respond
conduct	initiate	revise
contribute	inspect	schedule
coordinate	interpret	secure
delegate	interview	select
design	investigate	standardize
determine	maintain	submit
develop	make	supply
discuss	manage	supervise
distribute	notify	train
establish	obtain	verify



WRITING EFFECTIVE GOALS (continued)

Overcoming Obstacles

Fear of failure often keeps people from setting goals, because the only sure-fire way to avoid failure is to never attempt anything. Yet it is difficult to live, work and succeed in this type of bubble.

Three suggestions for dealing with fear of failure:

- **Redefine failure and success.** Take a proactive view of life by defining failure as an attempt to play it safe by doing nothing that involves risk. Success is attempting anything that forces you to grow as a person.
- **Reorient your basis for worth and value as a person.** Your personal worth is not defined by what you achieve, but rather by who you become.
- **Set goals only based on what you can control.** Goals that others can block, such as getting a promotion, always produce frustration and disappointment. You cannot control the choices and actions of others. Make goals based on what *you* can choose and what *you* can do.

Don't let fear rob you of the value of setting goals! Stretch your self-imposed boundaries. Leverage your strengths; don't get bound up in your weaknesses. See where setting goals can take you if you are willing to travel one step at a time. You may just surprise yourself.

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