

The Mentoring Workbook-Draft

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"We should not only use all the brains we have, but all that we can borrow." - Woodrow Wilson

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“It’s not about a mentoring relationship. It’s about a mentoring mentality.”
-*Women’s Ways of Mentoring*, Cheryl Dahle.

Introduction

Becoming a Learning Organization

Peter Senge, in his book *The Fifth Discipline: The Art and Practice of the Learning Organization*, defines the learning organization as “organizations where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together.” The library is an organization well aware of the limitless opportunities for learning, but we are often so focused on the needs of our patrons that we have little time to address our own learning needs, both as individuals and as an organization. This mentoring workbook is an attempt to provide some simple tools to make our learning needs a priority, and in turn, develop a network of seasoned learners capable of building a rich and fulfilling learning organization.

Mentoring

This workbook has been designed to assist those within the learning organization who are interested in gaining the most from a mentoring relationship. All of the information provided here will serve as suggestions for mentoring partners as they decide on the specifics of their relationship. These guidelines are intended to serve as a tool for partners but they have been designed to be flexible enough facilitate all types of learning relationships. This workbook will help you get the most out of the experience.

Ways of Mentoring

Mentoring has been around for a very long time. The term generates a variety of responses, some positive and some quite negative. The following definitions recognize the important role that relationships play in learning and career development. Choose those that seem most relevant to your desired relationship and take them with you as you move through this workbook.

Formal mentoring- the relationship is facilitated and supported by the organization

Informal mentoring- the relationship is created spontaneously and maintained informally by the pair

e-mentoring- the relationship occurs primarily or exclusively online

Group mentoring- more than a pair comes together, with one or more in the group providing support or direction to the others

Co-mentoring- members recognize the shared benefit for all in the relationship

When Odysseus went off to fight the Trojans, he chose Mentor, a semi-divine hermaphrodite and the personification of wisdom, to guide his son, Telemachus, through to adulthood. One description of Mentor was a “soul friend.”
[-The Management and Leadership Network](#)

Facilitated mentoring or Enhanced Informal Mentoring or Semi-formal Mentoring-

These newer definitions all refer to relationships which fall somewhere between formal and informal mentoring, in that they are facilitated and supported by the organization, and at the same time offer flexibility for participants to design the relationship to best meet their needs. This workbook was designed with these definitions in mind.

Myths of Mentoring

| Old Rule | New Rule |
|--|--|
| Mentors and protégés should have a lot in common | Actually the best matches are mismatches; they generate high potential for learning |
| Look for your mentor higher-up on the food chain | A good mentor is anyone you can learn from |
| Mentoring is one-on-one | Mentoring works best when you mix and match. Consider creating a mentoring quad, with two mentors and two mentees, or a mentoring circle with a few mentors and multiple mentees |
| Mentors pick their protégés | Partners are both involved in the selection |
| You're a mentor or a mentee | Everyone needs mentors |

-*Women's Ways of Mentoring*, Dahle.

What do we call ourselves?

As you can see, mentoring is not easy to define. Even more difficult is naming the participants in the mentoring relationship, especially since there can be an overlap in the learning and roles can be reciprocal in nature. Many choose to refer to the participants as 'partners' or 'mentoring partners'. This workbook uses the more traditional definitions of 'mentor' and 'protégé,' but you are encouraged to use which ever terms make sense for your relationship.

Mentoring is a relationship which gives people the opportunity to share their skills and experiences, and to grow and develop in the process.

-*Mentoring Made Easy*

Benefits

When mentoring is defined broadly the benefits are numerous.

For Organization

- Facilitate the alignment of staff and organizational needs and mission
- Orient staff new to the profession or new to the organization
- Increase job satisfaction
- Create a learning organization where skills and knowledge are shared and enhanced, making best use of talents in the organization
- Help staff in planning, developing, and managing their careers
- Encourage the development of leadership and management competencies, increase readiness for more responsibility
- Actively address issues of recruitment, retention and succession planning
- Increase minority employee representation in key positions, and support greater diversity
- Encourage cross-departmental and cross-system learning and network development
- Increase workforce flexibility, address changing needs and roles
- Support management through these changes

For Mentor

- Gain new insights and perspectives
- Increase job satisfaction
- Increase peer recognition
- Develop and improve communication skills
- Share expertise and experiences to benefit others
- Incentive to stay current
- Have a greater understanding of the changing skill set being brought into the profession

For Protégé

- Clarify personal vision
- Come to recognize barriers to performance
- Overcome barriers
- Have non-threatening opportunity to ask questions about organization and profession
- Improve communication, negotiation, decision-making and self-assessment skills
- Have increased opportunities for networking
- Develop new skills and knowledge and greater visibility with competencies

Roles and Responsibilities

Mentor

Here are some of the roles played by the mentor and the support they provide in the roles.

Communicator * encourages two-way exchange of information * listens to career concerns and responds appropriately * establishes an environment for open interaction * schedules uninterrupted time to meet with mentee * acts as a sounding board for ideas and concerns.

Counselor * works with mentee to identify and understand career-related skills, interests, and values * helps mentee evaluate appropriateness of career options * helps mentee plan strategies to achieve mutually agreed-upon goals.

Coach * helps to clarify performance goals and developmental needs * teaches managerial and technical skills * reinforces effective on-the-job performance * recommends specific behaviors that need improvement * clarifies and communicates organizational objectives and goals * serves as a role model to demonstrate successful professional behaviors--leads by example.

Advisor * communicates the informal and formal realities of progression within the organization * recommends opportunities for training * recommends appropriate strategies for career direction * reviews developmental plan on a regular basis * helps mentee identify career obstacles and take appropriate action to overcome them.

Broker * expands the mentee's network of professional contacts * helps bring together mentees who might mutually benefit from helping each other * helps link mentee with appropriate educational and employment opportunities * helps the mentee identify resources required for career progression.

Referral Agent * identifies resources to help mentored with specific problems * follows up to ensure effectiveness of resources.

Advocate * intervenes on the mentee's behalf and represents his or her concerns on specific issues to higher-level managers * arranges for mentored to participate in highly visible activities within the organization and outside of it.

-Measures for Mentors, Geiger

Protégé

The skills listed below have been identified as those that help a protégé get the most from the mentoring relationship.

Assertiveness * behaviors that don't violate other people's rights or sacrifice one's own.

Communication * listening, asking questions and expressing yourself.

Self-discipline * willing and able to undertake self-development tasks within a time frame.

Adult Learning * ability to assess your own needs, set your own objectives, access a variety of resources and apply your initiative to achieve learning outcomes.

Self-assessment * willing and able to look inward and identify strengths and weaknesses.

Information gathering * research by observation, asking people, reading material etc.

Goal setting * clarifying your needs, interests, preferences, constraints etc. then setting objectives in accordance with these.

Prioritizing * ability to evaluate alternatives and list them in order of urgency and importance.

Vision * ability to imagining possibilities for a desirable future.

Planning * working out what needs to be done in order to achieve an objective.

Evaluating * weighing up consequences of actions based on value or worth.

Managing conflict * discussing issues assertively, seeking to understand the needs and concerns of others, having the flexibility to explore options and finding effective solutions.

Organizing * coordinating your efforts and energy, managing your resources.

Make decisions * having considered options, determine desired and/or appropriate action.

Deal with feelings * recognize emotions and express them in an appropriate way.

Negotiate * state what you want, decide what you are willing to give in return, discuss options and arrive at a satisfactory win/win outcome.

Follow through * putting ideas into action

-Aynsley, *Choosing a mentor*

Essential Attributes of Successful Mentoring

Discussion with successful mentoring pairs identified the following essential attributes, many of which were applicable to both mentees and mentors:

- Ability to listen, openness and commitment
- Time management and self-management skills
- Assertiveness, realism and discretion
- Knowledgeable or able to find out
- Challenging, analytical and evaluating

- Ability to change and accept change
- Motivated and able to demonstrate leadership
- Able to identify opportunities
- Honest and able to give constructive advice

-Mentoring made easy

Partnership Agreement

Misunderstandings and disappointments will be minimized when mentors and mentees **discuss their expectations and agree on their respective roles and responsibilities** at the outset, as well as throughout the relationship.

-[ORNL Mentoring](#)

Completing the partnership agreement is an important part of developing the mentoring relationship. The suggestions below are designed to guide you in the development of your agreement but there are no set rules. It will be your responsibility as a pair to determine when and how often you make contact.

Assessing your needs

The benefits of mentoring are best realized if you take the time before you begin to take a personal inventory to clarify your needs and expectations. Here are some questions to consider as you assess your needs:

- What are my strengths and weaknesses as well as the opportunities and threats to development (SWOT)?
- Where am I in my career? Early, middle, or late career?
- What am I willing to invest to achieve my career goals?
- What motivates me in my job?
- What roles do I resist from lack of skills or understanding?
- Critical areas to focus my learning include...

Negotiating Mentoring Agreement

Recognizing that the relationship can provide reciprocal learning opportunities and that the duration and nature of the relationship may vary greatly within your organization, it is important to have a working language to draft some sort of agreement between those involved. Here are some key elements to discuss as you negotiate your mentoring agreement.

Confidentiality

While it is important for participants to trust one another, it is also important that you are comfortable with the kind of information that is shared. Sensitive issues related to behavior or code of conduct issues will complicate the parameters of confidentiality. As a part of the agreement, the participants may want to agree that the discussion will be limited to only that information pertinent to the development plan. Participants should certainly discuss how sensitive issues will be handled.

Duration of Relationship

Participants should agree on the approximate duration of their relationship. A timetable can serve two useful purposes. First, it can serve to motivate with a sense of urgency to complete the action plan before the 'due date.' Second, by establishing an ending date, the participants reinforce the temporary nature of the relationship and prevent any over dependency or possessiveness in the relationship (Stated in both Murray and Stone). Partners are encouraged to revisit the timetable and renegotiate the dates if appropriate.

No Fault Termination

Partners should consider specifying intervals for examining the relationship. The agreement should also specify the way the relationship could become terminated. If, at some point, either participant wishes to discontinue the relationship, they should do so, and may or may not provide reasons for the termination. The participants may choose to consult the program facilitator or members of the advisory committee to determine the best way to terminate the relationship without finding or acknowledging fault.

Frequency and Type of Meetings

Mentoring relationships are most likely to succeed if this is agreed upon at the beginning of the relationship. This may also benefit from reconsideration at specific intervals, but it will also depend on the nature of the development activities planned. It is also important to coordinate your meetings with your supervisor, and to discuss the extent that the relationship will occur on work time. Busy schedules may interfere with keeping appointments, but staff should be encouraged to demand time from each other in order to maintain the relationship. The negotiation of the agreement should include how the participants will alert the other of the urgency of checking in. This issue can be addressed in the details of how often you will make contact and if you will meet in person, via email, phone, or instant messaging.

Development Plan

The Worksheet for Mentoring Goals and Actions should include (see sample below):

- Protégés goals
- Protégés action steps
- Support needed of mentor
- Target dates
- Also consider resources required: assistant needed from other than mentor. People, places, funds, training and any other anticipated needs.
- Status/progress comments: To prepare for discussion between partners

Agreement Form

We are voluntarily entering into a mentoring relationship that we expect to benefit all participants as well as our organization. We expect this to be a rewarding experience, with most of our time spent in substantive development activities. To ensure a positive relationship, we agree to the following:

We define **confidentiality** as follows:

Duration of the relationship:

Frequency and length of meetings:

We will **review** our progress after _____ weeks.

We have defined the **context of this relationship** as: (career development, skills development, orientation to organization or position, etc.)

We have agreed to focus on the **goals and actions** outlined below

We agree to a **no-fault conclusion** of this relationship if, for any reason, it seems appropriate:

Signed and dated by partners:

Other Elements to Consider

- Reporting suggestions or requirements
- How do you want your mentor to acknowledge or recognize progress?
- As the mentor, how do you wish to be thanked or what sort of feedback do you want?
- How often will you to send an update to the program facilitator with status/progress comments?

Reflection Journal

For your own purposes, keep a reflection journal to help identify any concerns or highlight new discoveries that have come from your learning experience. Here are some suggestions for entries in your journal:

- Record events that have particularly pleased or frustrated you.
- Are your needs being addressed in the relationship?
- What expectations aren't being met?
- What improvements could be made in the relationship, in the meetings?
- Is your current mentor the appropriate person to help you reach your next level of goals?

Consider the reasons for perhaps moving on:

- Be sure to honestly acknowledge the difficulties, and perhaps offer suggestions for next time, but don't negate the learning which occurred, even if it was painful.
- Some relationships may inhibit the learning rather than support it.
- Remember your no-fault conclusion agreement, and don't allow the experience to become a burden.

Evaluation

Evaluation of your mentoring relationship will be two-fold. Because your feedback is important for the continued success of the mentoring program, you will be asked to evaluate the mentoring program overall. For your own learning, you should consider some of the following questions as you conclude your mentoring relationship. These questions will guide you as you continue in new relationships, both as a protégé or mentor, and throughout your interactions in the learning organization:

- What part of the relationship worked for you?
- What part of the relationship did not work for you?
- Would you do it again?
- How would you change the agreement, re-write the agreement?
- How did the experience affect your overall work experience?
- Have you become more aware of the ways we mentor or are mentored in our lives?
- How can you share what you have learned with others?

Resources

Print

- Geiger, A. (1992). Measures for mentors. *Training & Development*, 46(2), 65-68.
- Murray, M. (2001). *Beyond the myths and magic of mentoring: how to facilitate and effective mentoring process*. San Francisco: Jossey Bass.
- Senge, P. (1990). *The fifth discipline: the art and practice of the learning organization*. New York: Doubleday/Currency.
- Stone, F. (2004). *The Mentoring Advantage: Creating the Next Generation of Leaders*. Chicago, IL: Dearborn Trade Publishing.

Digital

- Aynsley, D. (2005). Choosing a mentor: using the SUN Mentor Register. Retrieved from http://www.usyd.edu.au/sun/docs/choosing_a_mentor.pdf
- Dahle, D. (1998). Women's ways of mentoring. *Fast Company*, 17, p.186. Retrieved from <http://www.fastcompany.com/magazine/17/womentoring.html>
- Freeman, M. *Mentoring*. Articles define characteristics and roles of mentors and protégés and components of a successful mentoring program. <http://www.sonic.net/~mfreeman/mentor/mentsupp.htm>
- Northern Territory Office for the Commissioner of Public Employment. (1998). Mentoring made easy: a practical guide for managers. Retrieved from http://www.nt.gov.au/ocpe/publications_forms/mentbook.pdf
- ORNL (Oak Ridge National Laboratory) Mentoring Presentation. http://www.ornl.gov/adm/hr_ornl/mentoring/index.htm

Websites

- The Coaching and Mentoring Network – Numerous articles on mentoring <http://www.coachingnetwork.org.uk/ResourceCentre/Articles/Default.asp>
- The Management and Leadership Network <http://www.mln.org.uk/askhow2.asp>
- The Mentoring Group <http://www.mentoringgroup.com/>

Worksheet for Mentoring Goals and Actions

Participants:

| Protégés Goals | Protégés Action Steps | Support needed of Mentor | Target Dates |
|----------------|-----------------------|--------------------------|--------------|
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