



Mentor Toolkit

This Mentor Toolkit provides best practices, resources and tips for your journey as a mentor.



THE OHIO STATE UNIVERSITY
HUMAN RESOURCES



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Introduction

This Mentor Toolkit provides a roadmap to help you understand your goals for mentoring and establish a fruitful relationship. You will find resources, tips and tools to use throughout your mentoring experience. The toolkit is organized into three sections:



1. REFLECT: Understand Your Role

Reflect on the role mentoring has played in your life and career and learn the characteristics of a successful mentor. See common scenarios where individuals seek mentoring.

2. BEGIN: Establish the Relationship

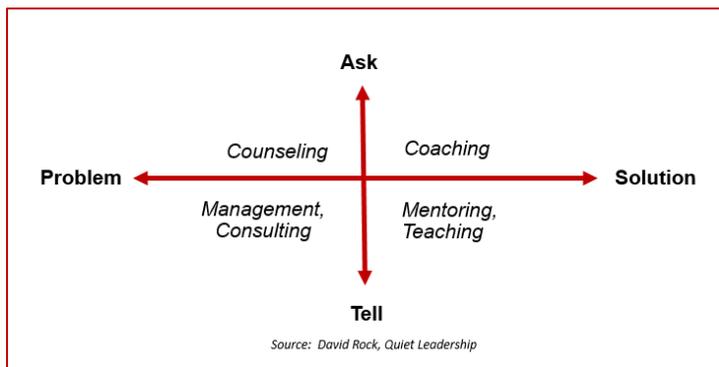
Lay a solid foundation with the mentoring relationship by developing a Partnership Agreement. To continue a strong and productive relationship, evaluate it on a regular basis.

3. END: Navigate the Transition

Reflect on your protégé's growth and provide feedback about the value of your relationship.

Mentoring versus Coaching

Comparing mentoring and coaching can be helpful as you explore your role as a mentor. Both approaches can help individuals accelerate their development and find solutions. Here are some key distinctions.



Coaching

Coaching emphasizes supporting someone through their own intentional change and discovery. The coach focuses on eliciting client-generated solutions and strategies (versus “telling” or “advising”). Professional coaching focuses on setting goals, creating outcomes and managing personal change.

Mentoring

A mentor is an expert who provides wisdom and guidance based on his or her own experience. Like coaching, mentoring focuses on solutions rather than problems. There is more “telling” in mentoring than in coaching, since the mentor serves as an advisor and guide. Mentoring may include advising, counseling and coaching.

For a more detailed explanation of how coaching differs from mentoring, therapy, consulting, training or athletic development, refer to this page at the International Coach Federation website:

<http://www.coachfederation.org/need/landing.cfm?ItemNumber=978&navItemNumber=567>

REFLECT: Understand Your Role

Reflecting on Mentorship in Your Life & Career

Adapted from Mentoring Skills Bite-Sized Training™, Mind Tools™

One of the best ways to discover the mentor in you is to examine mentoring you have received. It could have been a one-time intervention or a long-term relationship; it might have happened formally or informally. However, when you've been "touched" by a mentor, you know it.

To understand how *you* have benefited from mentoring, reflect on your own experiences:

1. What kind of mentoring did you receive?
2. How did it compare to the mentoring received by people around you?
3. What did you find helpful and unhelpful?
4. How well did the mentoring you received apply to your professional and/or personal success?
5. How well did your mentor prepare you for your career?
6. As you look back, what other kinds of mentoring would have been helpful? Were there occasions where mentoring would have helped you handle a difficult situation more effectively, gain clarity about your career, or avoid "learning the hard way"?

Your answers help define the kind of mentor you want to be and identify building blocks for developing productive mentoring relationships. Identify your key mentoring discoveries with the questions below.

Action: Reflect on significant events and people in your life in terms of mentoring.

1. Have you had an "ah ha" moment in your life? Who helped you make the discovery? How did this person impact your life? In what way is that person a mentor?
2. Has someone quoted something or said something to you that was so profound you've carried the meaning with you ever since? Who was it? Do you consider this person a mentor? Why or why not? What mentoring qualities did you learn from this person?
3. Did someone help you uncover a latent talent, ability or desire? How did this person encourage you and help you with your discovery? How has this influenced your life and your mentoring vision?

Becoming a Mentor

Adapted from Mentoring Skills Bite-Sized Training™, Mind Tools™

Effective mentoring, like wisdom itself, is multidimensional. The best mentors adjust their role to meet the protégé's needs. There is no single formula for good mentoring, yet key characteristics and behaviors build a foundation for good mentoring. These include:

Key Characteristics and Behaviors for Mentors	
Approachability	Let your protégées know you are interested and available. Share personal information and relate to them. Let them know they can come to you and you care
Sharing	Share experiences, feelings, observations and knowledge openly. Establish a pattern of mutual information exchange. Encourage trying new things and expanding their knowledge.
Confidentiality	Honor sensitive personal or professional information either of you might share.
Openness	Find ways to make sure contact is regular and meaningful.
Trust	Ensure your protégés feel free to discuss issues without fear of reprisal or judgment. Create an atmosphere where it is comfortable to test ideas and explore.
Respect	Let your protégés know you respect their time and opinions. Acknowledge their skills and progress.
Appropriate feedback	Express how you feel in a respectful and gentle manner. Timely, assertive, empathetic and honest communication is important.
Technical expertise	Remain current with your own knowledge (or acknowledge if you might not be and suggest where your protégés might seek additional information).
Support	Be motivating, encouraging, positive and empowering. Provide emotional, intellectual and practical support.
Commitment	Invest sufficient time in the relationship...mentor regularly.
Desire	Be truly interested in helping someone else, without promise of help in return.
Reliability and consistency	Both you and your protégé should carry out agreed-upon actions.

These qualities send a powerful message that your protégé is worth the time you are investing, you will be honest and open, and you are engaged in and support their development and success. This will help your protégé get through challenges and emerge better, stronger and more capable.



Common Mentoring Scenarios

Here are examples of common mentoring scenarios and how the protégé might express the mentoring need. Have you sought mentoring or advice in any of these areas? Where do you think you would bring the most value as a mentor?

Common Mentoring Scenarios
<p>New to job, new to OSU, new to role, learning to navigate, etc.</p> <ul style="list-style-type: none">• I'm new and would like to have someone to go to with questions or concerns. I'm still figuring out how things work around here.• I'm looking for help learning to navigate around here. How are decisions made? How do all these committees work and how do they relate? When do I have to take something to the senior management council? When do I make a decision and when is it made by a committee?• I'm new to being a manager/senior manager/director. I would like to have someone who "knows the ropes" who can be a sounding board and provide insight.
<p>Interpersonal concerns or new territory</p> <ul style="list-style-type: none">• I'm having trouble collaborating with someone. I thought you might have some suggestions. I want to understand more about the dynamics going on.• I'm speaking up at meetings but I feel like I'm not being heard. I'm looking for suggestions and some insight into what's going on.• I have some challenging conversations coming up. I'm not sure how to approach them. Could we talk about it confidentially?
<p>Build a skill or background</p> <ul style="list-style-type: none">• I would like to further develop my ____ skills. Could we talk about my goals and see if you perhaps you could mentor me short-term, very informally?• I'm not used to using [tool, program, etc.] the way my group uses it. Could you please give me some pointers?
<p>Expand your network (not necessarily a mentoring request but fostering more relationships)</p> <ul style="list-style-type: none">• I'm trying to get to know people in different functions/parts of the university. [Share something about the person or her work that interested you.] Could we meet for lunch or coffee?• I really enjoyed your presentation. I have some questions about... I would like to learn more about... Could we get together?
<p>Career exploration</p> <ul style="list-style-type: none">• I'm feeling stagnant in my career. I'm working with my manager and want to have a mentor too to help me refine a new direction. (Note: Reflect on your career using the exercises in the Protégé Toolkit.)• I'm intrigued by what you do and would like to find out more about your area. Maybe there is a project I could help with.
<p>Reverse mentoring</p> <ul style="list-style-type: none">• Part of the audience for my project is millennials. Could I please share it with you to see if it resonates or if I need to make some changes?

Six Key Dimensions for Mentors

Adapted from Cohen (1995-Mentoring Adult Learners; 1999-The Manager's Guide to Effective Mentoring) by Graham Cochran, OSU Extension, May 2007

Mentors advocate for learning, constructive change and positive growth, drawing on a number of interrelated functions. When these functions combine, there is a synergistic effect. Successful mentors utilize these six key mentoring dimensions in their relationships with protégés.

6 Key Mentoring Dimensions	
Relationship Emphasis	<p>Conveys a genuine understanding and acceptance of the protégé's feelings through active, empathetic listening. Establishes trust.</p> <p>Essential behaviors: Sharing/reflecting, empathetic listening, open-ended questions, and perception checks</p>
Informative Emphasis	<p>Directly requests detailed information and offers specific suggestions about current plans and progress. Offers tailored advice.</p> <p>Essential behaviors: Learning facts about plans/progress, providing tailored/accurate knowledge while avoiding the "quick fix" or instant answers</p>
Facilitative Focus	<p>Guides protégé through a reasonably in-depth review or exploration of their interests, abilities and beliefs. Introduces alternative views and options.</p> <p>Essential behaviors: Exploring interests/abilities/ideas, revealing other views and discussing decisions</p>
Confrontive Focus	<p>Respectfully challenges protégé's explanations for or avoidance of decision and actions. Stimulates a broader perspective.</p> <p>Essential behaviors: Probing, respecting decisions, providing insight into unproductive strategies, evaluating need to change, and reinforcing positive potential for growth</p>
Mentor Model	<p>Shares life experiences and feelings as a role model to personalize and enrich the relationship and motivate.</p> <p>Essential behaviors: Disclosing life experiences, personalizing the relationship, expressing view of appropriate risk taking and encouraging actions to achieve goals</p>
Protégé Vision	<p>Stimulates protégé's critical thinking with regard to envisioning their future and developing their potential. Encourages managing change and taking initiative.</p> <p>Essential behaviors: Thinking critically about the future, realizing potential, exploring options, initiating change and expressing confidence in carefully thought out decisions.</p>

Planning to Mentor

Adapted from Mentoring Skills Bite-Sized Training™, Mind Tools™

Before entering into a mentoring relationship, clarify your hopes for the relationship. As it grows, you will likely revisit your original assumptions, but having a place to start is useful.

Why do you want to be a mentor?

- Have a way to “give back”?
- Provide encouragement and support to someone else?
- Establish a close relationship?
- Challenge yourself to learn new things?
- Pass on knowledge?
- Further develop your network?



What do you expect to discuss, explore and provide?

- Your own work?
- Technical issues?
- Workplace realities?
- How to network?
- How to maintain a balance in work and life?
- How to identify and fulfill personal dreams?
- Help securing a job: opportunities, networking, interviews, resume critique, etc.?

Action: Think of a person you might consider mentoring, and detail your expectations about how the relationship might work. Use these questions as a starting point.

1. Why do you want to mentor?
2. What might you discuss, explore and provide?
3. What characteristics would make you a good mentor?
4. What benefits do you believe you will gain from a mentoring relationship?
5. By what rules do you want to operate?

Reverse Mentoring

Depending on your role and interests, you may be interested in reverse mentoring. This is the practice of more senior staff consulting younger or less experienced staff for their wisdom and perspective. What motivates, challenges and engages their generation? What technologies and approaches tap into that group's thinking and behavior?

Reverse mentoring is an efficient way to bridge generation gaps in organizations. It leads to significant insights and increased performance. It's also a great opportunity for younger workers to connect with the organization and enhance their level of engagement and commitment.



Tips for Success in the Mentoring Relationship

Once you embark on a mentoring relationship, keep in mind these tips for success.

Tips for Success in the Mentoring Relationship	
Develop the relationship	<p>Every mentoring relationship needs two elements. First, what are the protégé's goals for the relationship and what are yours – what do you want to learn or achieve? Second, what role does the protégé want you to play? Are you comfortable with that role?</p> <p>Explore these questions early on to set the foundation for the relationship.</p>
Recognize the power of feedback	<p>Mentors provide the gift of feedback. By sharing unbiased perceptions in a kind and honest way, mentors have tremendous impact. Provide coaching points as well as recognize growth and change. Feedback given in the spirit of helpfulness and progress is appreciated and acted on, as long as it is specific and direct, solicits the protégé's input, and points the way to change.</p>
Be yourself	<p>Be straightforward about your strengths and weaknesses – model how a successful person deals with reality. Offer your own lessons learned, struggles and successes. Being a mentor does not mean being perfect. Many protégés report their mentors helped them by disclosing how they handled difficult aspects of their own personalities</p>
Be a question coach	<p>Mentors do not have to have all the answers – they help their protégés self-discover. Use questions to help your protégé reflect on experiences and draw out key learning points.</p> <p>Promote reflection and insight by asking questions such as these: What did you learn from this situation? How might you approach it next time? What patterns are you noticing about yourself?</p>
Shine a new light	<p>Mentors have the luxury of being distant from their protégé's work problems and challenges. Use to provide the "big picture" as a context for daily ups and downs. Teach your protégé to do the same.</p>
Let actions speak louder than words	<p>Most people learn by doing. If possible, involve your protégé in one of your work experiences that could be a learning opportunity. Afterward, debrief the events and relate them to the protégé's development. Share your thought process regarding how you handled or acted in the situation. In the process, the protégé may contribute some valuable feedback.</p>

Be a great listener

Adopt these key listening skills for mentors:

- Develop a desire (motivation) to listen, regardless of your level of interest in what your protégé is saying.
- Increase your capacity to listen.
- Infer your protégé's intent or purpose: What is the protégé implying or suggesting about goals or needs?
- Determine your own purpose in every listening situation.
- Become aware of your biases and attitudes. What words, ideas or beliefs function as "shock" words to you?
- Learn to use your "spare time" effectively and productively as you listen.
- Analyze your listening habits (both productive and unproductive).
- Be mentally and physically prepared to listen.
- Delay judgments; hear your protégé out before making judgments.
- Listen not only for facts, but for main ideas, principles, concepts and patterns.

Your Protégé's Preparation – The Protégé Toolkit

The Protégé Toolkit recommends that protégés reflect on their career and personal or professional goals using a self-assessment and other tools. This helps them clarify what they are seeking in a mentoring relationship.



BEGIN: Establish the Relationship

By creating a Partnership Agreement, you and your protégé can find out more about each other and the focus for your relationship. In this section you will also find agendas to guide your meetings, tools to evaluate your relationship on a regular basis, as well as do's and don'ts.

Partnership Agreement

Use this 3-step Partnership Agreement with your protégé to find out more about each other and set goals and expectations. The Partnership Agreement is also included in the Protégé Toolkit.

Partnership Agreement Step 1: Who Are We?

To launch a successful mentoring partnership, it is important to get to know each other. Below are some items you may want to know about each other.

- Personal Background: Life history, career history, experiences, core values, personal motto...
- Goals: Personal, career, progress toward achieving, obstacles in achieving...
- Perspectives: Keys to success, development needed, about work, about organizations, your commitments...
- Thinking Process: How you like to learn, solve problems, or make decisions...your new areas of interest...
- Skills and Abilities: What you do best, what you want to do more of, what you want to learn to do...

Conversation Starters for Mentors

- Which assignments have provided you with the most challenge? The least challenge? Why?
- Tell me about an accomplishment of which you are particularly proud.
- What are your most important values? Which values are met and not met at work?
- What makes you unique? Talk about values, interests, competencies and skills, personal traits, style...
- What part of your education or work experience has been the most valuable over the years?
- What actions have you taken to manage your career? What assistance may I provide?
- What lessons have you learned from your successes and failures?
- What is your biggest challenge in trying to balance your work life and personal life?

Partnership Agreement Step 2: What are Our Expectations and Goals?

One of the most important things both partners can do is agree to expectations, goals, ground rules and a time frame for your mentoring partnership. Periodically come back to these and evaluate “how we are doing”.

Write your thoughts to the questions below individually, then fully discuss them with each other.

1. Why do I want to be a mentoring partner?
2. What do I want from you?
3. How do I want this partnership to function?
4. How much face-to-face time can I invest?
5. What should be the approximate length of our meetings?
6. What other support will/do I need from you?
7. What ground rules do I want for our meeting/relationship (e.g., confidentiality, reciprocal trust/respect, commitment, etc.)?
8. What is the time commitment? There is flexibility around the duration of a mentoring engagement, depending on the goals of the protégé and the availability of the mentor. Mentoring pairs often agree to 3 or 6 months, then re-evaluate at that point.

Mentor/Protégé Worksheet

This worksheet sets the parameters of a mentoring relationship to meet the needs of both the mentor and the protégé. Any questions and answers from the previous two pages can be used for this worksheet.

Planning Meeting

Date:
Time:
Place:

Goals/ Expectations

- 1.
 - 2.
 - 3.
-

Teaching/ Learning Styles

Mentor's Teaching Style	Protégé's Learning Style

Preferred Method of Communication

"Hot Buttons"

Ongoing Meeting Schedule

Partnership Agreement Step 3: What Are We Going To Do?

Work together to define at least one action item that will help reach the protégé's goal(s). Mentors are there to facilitate the discussion and move it toward a definable action chosen by the protégé – it is the protégés who take action and make something that is easily incorporated into daily activities and is short term.

1. Incorporate practice: Consider simulating the actual situation, asking “what if” questions and role playing or rehearsing what the action will look like in real time.
2. Reflect on outcomes: Did things go as planned? If not, what actions are needed? What was learned that has broader application?

Move to action!

- The first action plan is:

- The target date for completion is:

- What do we want to work on together, or what does the protégé need to practice?

Tips and Agendas for Mentors and Protégés

- Have a focus for each discussion: compelling question, case study, new experience, article, etc.
- Consider sharing resumes or LinkedIn profiles.
- Be open and honest. Ask for what you need, solicit feedback, share what you are learning.
- Keep confidences. It's important that you can count on each other to treat confidential information with integrity.
- Honor the commitments you make to each other (meetings, follow up, etc.).
- Ask powerful questions and continue to be curious about each other as individuals.
- Enjoy the experience! It's a gift to have someone who is interested in the same work you are and wants to learn and share knowledge.

Possible Mentoring Agendas	
<p>Meeting 1</p> <ul style="list-style-type: none"> • Get to know each other • Bring completed biography and activity sheet • Clarify mentor and protégé experience • Program objectives, roles, processes • How to measure success of the mentoring relationship • Determine the future meetings <ul style="list-style-type: none"> ○ Location, frequency, meeting length, how to schedule • Communication between meetings <ul style="list-style-type: none"> ○ Acceptable time of day to contact ○ Best method: phone, email, etc. • Confidentiality • Set up the next meeting 	<p>Additional areas to explore</p> <ul style="list-style-type: none"> • Jobs, functions, and roles the protégé might benefit from and enjoy • Current job functions, skills, successes, failure, and obstacles/challenges • Challenges or concerns created by change • Opportunities for further exposure and challenge • Managing work-life balance • Challenges in the development toward goals • Influences of the functional group and management perspectives of protégé's performance • Options for training, education, continuous learning • Organizational culture and how to influence and impact the organization • Networking and creating social capital • Mutual feedback on your relationship and progress

<p>Meeting 2</p> <ul style="list-style-type: none"> • Explore possible career interests and questions • Set clear professional development goals • Identify potential action plans 	<p>Last meeting prior to closure</p> <ul style="list-style-type: none"> • Discuss final project outcome • Evaluate results • Discuss future actions and potential actions
<p>Meeting 3</p> <ul style="list-style-type: none"> • Solidify the action plan(s) • Create a series of achievable goals • Agree on how relationship will come to a close at the end of the mentoring period 	<p>Closing Meeting</p> <ul style="list-style-type: none"> • Discuss closing items for the action plan • Reflect on the mentorship process • Discuss positive changes that occurred for both of you • How are you going to apply and integrate what you have learned through the mentoring? • Redefine the relationship • Any terms going forward • Celebrate your success
<p>Subsequent Meetings</p> <ul style="list-style-type: none"> • Discuss any situations which occurred between meetings • Discuss action plan • Offer positive and constructive feedback 	<p>Potential Questions</p> <ul style="list-style-type: none"> • What has taken place since we last met? • What questions or issues were raised for you by the experience? • What did you learn from the experience? • What will you do differently in the future? • What could you do to continue to advance your growth?

Evaluating your Mentor Relationship

Candidly evaluating the mentoring relationship on a regular basis allows both mentors and protégés to make adjustments to insure the highest quality mentoring relationship. These prompts can prepare you to talk about how you are each doing and how the relationship is going overall.

How Are We Doing? Evaluation Questions for Mentors and Protégés
Aspects of our relationship that are working well are:
Our relationship could improve if:

I need more of:
I need less of:
What has been the most useful to me is:
What has been the least useful to me:
The quality and frequency of our communication is:
Additional Areas of Reflection for Mentors
Where is progress occurring?
Is the protégé asking good questions and demonstrating personal reflection?
What extra support, guidance, challenges, or experiences could the protégé benefit from right now?
Additional comments or observations

Do's and Don'ts for Mentors

Do's

- Be clear about your motives for helping your protégé. If you're not sure yourself, the protégé will get mixed messages from you.
- Look after your protégé's needs, but consider your own as well. Be certain about what you want from the relationship and what you're willing to give.
- Be prepared for the relationship to end. The successful mentor-protégé cycle requires that the protégé move on and the relationship ends or takes a different form.
- Take time to candidly evaluate your mentoring relationship on a regular basis. What is going well? How could the relationship improve?



Don'ts

- Do not try to force your protégé to follow in your footsteps. If the footsteps fit, your protégé will follow them voluntarily. Value your protégé's unique path and where they are along the path.
- Do not have a pre-conceived plan for the outcome of your relationship.

END: Navigate the Transition

There will come a time when you or your protégé feel it is time to wrap up the relationship. Ending well is important – first impressions and last impressions are what we remember most about others.

Remember that a mentoring relationship is not a permanent commitment. The goal is to help the protégé move forward in career and life goals. Perhaps these goals have been met. Or if this is not occurring and you do not see adjustments that can be made to meet those goals, end the relationship respectfully and honestly.

Your “formal” mentoring relationship may shift to a more informal, infrequent interaction. You never know when your paths may cross again, under what circumstances, and when you may need help or advice from each other in the future.

Tips to End Your Mentoring Relationship on a Positive Note

- Be clear about why you and your protégé are ending the relationship. If the protégé has achieved his or her goals – celebrate!
- If either of you has chosen to end the relationship for other reasons, share them. Perhaps the relationship is not moving the protégé forward and other professional development activities would make more sense.
- Regardless of the reason, give protégés clear feedback about what went well, what growth you have seen, what strengths you see in them, what they might do differently in future mentoring relationships, and what you gained from the relationship.

