MENTORING 101
Tools, tips and techniques to being an effective mentor

Session Components

- Defining Mentorship
- Expectations and Guidelines
- Rules of the Road
- Meaningful Meetings
- Best Practices and Resources

Show me a successful individual and I’ll show you someone who had real positives influences in his or her life.

A mentor is someone who allows you to see the hope inside yourself.

Mentoring is a brain to pick, an ear to listen, & a push in the right direction.

Denzel Washington
Oprah
John Crosby
Defining Mentorship

What is mentoring?

Mentoring is a relationship between an experienced professional (mentor) who shares their knowledge, skills, and experience with another professional (mentee) to assist in their career progression.

"Mentoring is to support and encourage people to manage their own learning in order that they may maximise their potential, develop their skills, improve their performance and become the person they want to be."

- Eric Parsloe, The Oxford School of Coaching & Mentoring

Mentoring is...

- A powerful, professional development tool
- An effective way to help individuals progress in their careers
- About long range career planning and/or improving certain skills and abilities

A mentor is:

- A guide to help the mentee navigate their professional journey
- A trusted and respected advisor
- Someone that explores with the mentee their current career situation, what they wish to achieve and how they can go about reaching their goals without prescribing solutions or career routes
- Someone that provides support and advice that empowers the mentee to explore, establish and pursue goals

Qualities of a good mentor:

- Honest
- Trustworthy
- Supportive
- Listener
- Approachable
- Open
- __________
- __________
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Mentor Expectations

As a mentor you will:

- Meet with your mentee a minimum of four times within a 12 month period
- Review and discuss his or her feedback, resume, or other relevant materials
- Assist with your mentee with the development of an Employee Development Plan
- Be familiar with and recommend internal and external developmental activities

Sample Meeting Schedule

Meeting 1

- Introduce yourself and share your background
- Get to know your mentee
- Review and discuss their feedback from the Career Development Assessment Center
- Discuss format of meetings, ground rules, expectations, etc.
- Decide on course of action for creating the Employee Development Plan

Meeting 2

- Review action items from previous meeting
- Check in regarding any challenges, road blocks, or questions and suggest additional development activities
- Start or continue creation of employee development plan

Meeting 3

- Review action items from previous meeting
- Check in regarding any challenges, road blocks, or questions and suggest additional development activities
- Continue or finalize creation of employee development plan

Meeting 4

- Review action items from previous meeting
- Check in regarding any challenges, road blocks, or questions and suggest additional development activities
- Discuss final employee development plan and determine next steps
- Close out the mentorship

FYI:

- Mentoring meetings are done on County time (001)
- Mentees may use the meetings toward their 20 hour training target; they must enter it as an external training in LMS
- The Employee Development Plan may be completed in Workday
Rules of the Road

As a mentor, you will help your mentee navigate a career path and/or improvement goals through a series of coaching conversations and the creation of a development plan with goals, targets, and time frames. Mentoring is a learning partnership that when done effectively, can be beneficial for both the mentee and mentor. Below are several ways that will assist you in establishing a trusting relationship and building rapport with your mentee:

- Start from where your mentee is at
- Put your intern at ease by being open and approachable
- Advise and support your mentee to the best of your ability without problem solving for him or her
- Practice focused listening, meaningful reflection, and sincere communication of interest
- Encourage and suggest developmental activities for your mentee
- Maintain a focus on professional growth; suggest the mentee seeks support if personal concerns are brought up
- Be honest and candid regarding feedback, practicality of goals, opportunities, etc.
- Encourage your mentee to involve their manager in the process and to keep them informed
- Assist the mentee with building a better relationships or coping skills if issues arise regarding his or her manager or colleagues
- Ensure that both your supervisor and the mentee’s supervisor are aware of and approve of time commitments
Mentor Tip Sheet

As the mentor, your role is to guide the meeting, ask questions, and listen. Remember, you are NOT here to solve the mentees issues or do the work for them. You are a coach and guide for them. They are in the driver’s seat.

1. Encourage the mentee to come prepared and bring relevant materials and information to the meeting.

2. Greet, build rapport

3. Discuss action items from the previous meeting with the meeting preparation form. Do not judge mentee if he/she does not complete all action items. Discuss the roadblocks in completing the items and give support. New commitments for action items can be set.

4. Establish new objectives for each meeting. Sometimes the outcomes will be about other issues that have come up. Once issues are resolved, the mentor can bring the mentee back to the original goals set and how to accomplish them.

5. Explore the set objectives. Ask questions, share, and coach. The mentor will ask the mentee what actions need to be taken to achieve their goals. This is a great time to ask questions so the mentee can get find their own answers. After the mentee explores ideas, the mentor will suggest ideas and shares experiences.

6. Discuss plan for possible roadblocks. This will allow the mentee to realize when the roadblocks occur and how to effectively deal with them.

7. Mentor will establish new action items with mentee. These action items will forward the mentee to achieving his/her goals. It is suggested that the mentor first asks the mentee what actions will they take to forward their goal. After the mentee comes up with a few items, it is ok for the mentor to suggest items as well.

8. Closure of meeting. Express confidence in mentee and acknowledge the progress so far. Confirm to do items and next steps.

9. Set up a date for the next meeting.

10. Assist with mentee with completing the Employee Development Plan (EDP).
Meaningful Meetings

Key Points

- Allow your mentee to run the meeting but assist with keeping it on track
- The first few minutes may be less structured as you build rapport and trust.
- Then a more structured meeting plan will help you move forward and realize progress to the goals you and your mentee have established.

Meeting Disciplines

- Ask the mentee to come prepared with an agenda and meeting objectives
- Review action items from prior meeting.
- Discuss anything that is not supporting the mentoring agreement (being late, etc).
- Stay focused on meeting objectives
- Summarize action items and commitments with deadlines.
- Debrief results.
- Check in with your mentee between meetings, if necessary, to ask about their progress or if any support is needed

Time Examples for Meetings

<table>
<thead>
<tr>
<th>Activity</th>
<th>Time</th>
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</thead>
<tbody>
<tr>
<td>Build rapport.</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Review actions items from last meeting.</td>
<td>15 minutes</td>
</tr>
<tr>
<td>Review development plan goals/activities</td>
<td>5 minutes</td>
</tr>
<tr>
<td>Discuss new objectives</td>
<td>20 minutes</td>
</tr>
<tr>
<td>New action items for the next meeting.</td>
<td>10 minutes</td>
</tr>
<tr>
<td>Close meeting- acknowledge progress, thank you’s &amp; schedule next meeting.</td>
<td>5 minutes</td>
</tr>
</tbody>
</table>
Development Activities

**Suggestion Bank**

- Sharing career history
- Address mentee challenges
- Identifying goals
- Discuss interpersonal skills
- Role play
- Recommend or provide job shadowing
- Provide or suggest networking opportunities
- Provide oral and written feedback
- Suggest articles and books
- Connect your mentee with individuals for informational interviews
- Review samples of your mentees work
- Train or coach the mentee in a specific skill
- Recommend relevant County trainings
- Conduct a SWOT analysis with your mentee

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- ______________________________
Power Questions

GETTING STARTED
1. What do you hope to accomplish through our mentoring relationship?
2. What characteristics are you seeking in a mentor?
3. How might I mentor or coach you? Do you like me to be really honest and to the point, or is there another way that works for you?
4. What principles should we develop to manage confidentiality?
5. What are your expectations regarding this mentoring relationship?
6. What questions do you have about our mentoring relationship?
7. What should we do if we find we are not compatible?

VALUES AND VISIONS
1. What have been the greatest achievements on your life journey and how did you attain them?
2. What turns have you taken on your journey that you did not expect to take?
3. What are your life dreams?
4. In what way have your dreams turned into plans?
5. What would you like your life to be like in five years time?
6. When you think about yourself ten years ago and compare yourself with who you are today, how would you describe the differences and similarities?
7. How does your vision match the vision or mission of your organization?
8. How can you ensure that your work life is meaningful and relevant to you personally and professionally?
9. What five values – in order - are most important to you?
10. When are you most naturally, comfortably and fully yourself?
11. What is your greatest talent?
12. How can you get paid for doing what you love?
13. Who are your most inspiring role models and what values do they have?
14. How can you best be of service to others?
15. To what degree do you believe you are living up to your potential??
16. What legacy would you like to leave?
17. What is one thing you could stop doing, or start doing, or do differently, starting today that would most improve the quality of your life?

GOALS AND ACTIONS
1. What important goal in your life would you like to give more attention to?
2. What is it that makes that goal important to you?
3. What do you need to achieve your life goals?
4. What challenges are you facing right now at work?
5. What are your current work goals?
6. How do you measure your goals?
7. What is the most difficult goal for you to accomplish at work?
8. What are you currently doing to overcome this difficulty?
9. If all the problems at work magically disappeared overnight, what would you notice that was different when you walked into the office tomorrow?
10. What would you attempt to do, if you knew you could not fail?
11. What is the worst thing that could happen if you attempted that thing – and failed?
12. If you had to change one thing about the way you work, what would it be?
13. What work goals would you like to achieve in the next three to six months?
14. What is attractive about these goals?
15. How realistic are the goals?
16. What resources are needed to help you achieve your goals?
17. What kind of time line needs to be established to help with your goals?

**LIFE AND LEARNING**

1. What worries you the most at work?
2. How do you behave when you get worried or anxious at work?
3. What are ways that you cope with stress and deadlines?
4. In what areas would you describe yourself as highly flexible?
5. What ethical principles govern your decision-making?
6. In what areas would you describe yourself as highly inflexible?
7. What sustains you when everything and everyone around you seems to be in chaos or against you?
8. When has your attitude to a difficult situation helped you achieve something important and how did that happen?
9. When have you failed at something that was important to you and what was the experience like?
10. What have you learned from your own mistakes, failures or disappointments?
11. How are do you manage the balance between your work life and your personal life?
12. How can you become more creative or innovative in your work?
13. When have you taken risks at work and what happened?
14. What role does learning play in your life?
15. What has been the most difficult lesson you have had to learn?
16. When you are trying to learn something new, how do you typically go about it and how does that work for you?
Power Questions Continued

17. What do you typically do to help another person learn something?
18. What factors affected your success in helping another person learn?
19. What metaphor would you use to describe yourself as a teacher?

RELATIONSHIPS AND CHANGE

1. What are five rules you have – or would like to have - for relating with your colleagues?
2. When you are in conflict with another person, how do you typically go about resolving it and how successful are you in fully resolving it?
3. When you consider confronting another person, what metaphor would you use to describe yourself?
4. What experience have you had standing up for someone even though you didn't agree with him or her?
5. What are your most important work relationships and how can you improve them?
6. If you were communicating the best that you could, what would they be doing differently?
7. What can you do in your organization to remove, reduce, or eliminate negative or toxic forces?
8. What metaphor would you use to describe how you respond to change?
9. What is your most satisfying experience of being involved in a change process?
10. How do you go about managing resistance to changes you are trying to implement?
11. What would be your five principles for effective change?

COACHING EVALUATION

1. To what extent are you meeting your goals through the mentoring process?
2. How would you assess the quality of our mentoring relationship?
3. In what ways can we strengthen our mentoring relationship?
4. What are three strategies that could improve our mentoring work and how can we put those strategies into practice?
5. When you consider our mentoring, what would you like us to do less or more or ?
6. What insights have you gained from mentoring?
7. What things/skills/attitudes/knowledge have you gained from mentoring that will be useful to you in the future?
Forms

The following forms are provided to assist with meeting organization and facilitating an effective mentorship:

Mentoring Agreement

Meeting Preparation Form

Employee Development Plan

For additional resources, please visit:
http://hr.smcgov.org/career-development-resources
MENTORING AGREEMENT

Meeting Frequency: ______________________

Contact Information

<table>
<thead>
<tr>
<th>Mentor</th>
<th>Mentee</th>
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<tbody>
<tr>
<td>Name:</td>
<td>Name:</td>
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<td>Phone Number:</td>
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<td>Email:</td>
<td>Email:</td>
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<tr>
<td>Preferred contact method:</td>
<td>Preferred contact method:</td>
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Write two to three specific and measurable goals for the course of the mentorship.
Examples: Complete EDP, Improve on ________, Do (insert development activities)

<table>
<thead>
<tr>
<th>Goal #1:</th>
<th>Beginning Date</th>
<th>Projected Ending Date</th>
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<tbody>
<tr>
<td>Activities:</td>
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<table>
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<tr>
<th>Goal #2:</th>
<th>Beginning Date</th>
<th>Projected Ending Date</th>
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<tbody>
<tr>
<td>Activities:</td>
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<table>
<thead>
<tr>
<th>Goal #3:</th>
<th>Beginning Date</th>
<th>Projected Ending Date</th>
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<tbody>
<tr>
<td>Activities:</td>
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</table>
Ground Rules/ Expectations

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Confidentiality- I agree to keep our conversations confidential unless both parties agree to do otherwise (unless there is a mandatory reporting issue).

Mentor______________________________________  Date____________________

Mentee______________________________________  Date____________________
**Meeting Preparation Form**

**Date:**  
**Time:**  
**Location:**

**Meeting Objectives:** (Fill out at beginning of each meeting) **Met?**

<table>
<thead>
<tr>
<th>Meeting Objectives</th>
<th>Met?</th>
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(If objectives are not all met, you can put them on the next meeting agenda.)

**Action Items:** (To do by next meeting) **Complete?**

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<th>Action Items</th>
<th>Complete?</th>
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Review these items at the beginning of every meeting to see if items are complete or if support is needed to complete an action item.

Meeting objectives and action items should support the mentee’s goals. Please review mentee’s program development plan on a regular basis.

**Notes:**

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**Next Meeting Date, Time, and Location:** ________________________________
## Alignment of Goals to Department/County Mission

The **relevancy** of my goals/objectives with department/county priorities (how does this relate to broader goals? why is the result important?):

---

<table>
<thead>
<tr>
<th>Developmental Goals/Objectives</th>
<th>Measurement</th>
<th>Specific Action Steps/Training</th>
<th>Target Dates</th>
<th>Comments/Notes</th>
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</thead>
<tbody>
<tr>
<td>My goals (result I want) for the next year:</td>
<td>I will measure my success by (how many, how much, data):</td>
<td>I will pursue the following developmental activities:</td>
<td>My target dates for start and completion are:</td>
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## Resources Needed

I will need the following support and resources:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Description</th>
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## Competencies

My goals involve developing the following competencies:

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
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