
Los Angeles Chapter

Mentoring Program

Participant Guide

February 2015



Revisions

Revision date	Effective Date	Author	Approval	What changed?
10/01/2013	10/01/2013	Anthony Lewis	AML	Researched, designed, and formatted.
02/01/2015	02/01/2015	Anthony Lewis	AML	Updated all activities and content.
02/20/2015	02/15/2015	Anthony Lewis	AML	Retrofitted course for chapter.

Note: Most recent revision at the bottom of list

References

Zachary, L. *The Mentor's Guide: Facilitating Effective Learning Relationships* (Paperback)

Crisp: Mentoring, Third Edition: How to Develop Successful Mentor Behaviors (Crisp 50-Minute Book) (Paperback) by Gordon F. Shea (Author)

Coaching and Mentoring: How to Develop Top Talent and Achieve Stronger Performance (Harvard Business Essentials)

Zachary, L. Fischler, L. *The Mentee's Guide: Making Mentoring Work for You* (Paperback)

Dealing with People You Can't Stand. Rick Brinkman and Dr Rick Kirschner (Authors)

Covey, S. *The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change.* New York: Simon & Schuster, 1990.

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Goal

The purpose of this reference course is to provide you with guidelines about the mentoring program.

Objectives

Upon reviewing this reference guide, you will be able to:

- Understand the program expectations of its mentors and mentees
- Begin planning to develop SMART goals
- Explain the roles of mentors and mentees
- Determine the effective communication skills required to be successful
- Gain agreement and commitment from mentors and mentees

The ATD Competency Model

The ATD Competency Model redefines the skills and knowledge required for trainers to be successful now and in the future. It captures changes driven by digital, mobile, and social technology; demographic shifts; globalization; and economic forces.

- Defines the latest competencies needed for success across the entire TD industry.
- Provides a professional development roadmap for TD leaders and practitioners.
- Identifies TD skills gaps and ways to close them that align with individual and organizational goals.



The Model emphasizes:

- (1) Foundational competencies, or those that are important to everyone in the field, and
- (2) Specific areas of expertise (AOEs), which are the specialized knowledge and actions required by specific roles.

My Career Plan

- Review the list of foundational competencies shown in the model and rate their importance to your present job.
- List your priorities for development of the competencies that are most important (greatest impact) for your present job.
- Review and select the AOEs you need now and at future jobs.
- List your priorities for development.
- Discuss your choices and priorities with your employer, mentor, coach, or supervisor and develop an action plan.
- Identify practical applications to apply the competencies and AOEs

Origin

According to Homer's *Odyssey*, when King Odysseus went off to fight in the Trojan war, he left his son, Telemachus, in the hands of a wise old man named Mentor who was charged with the task of teaching the young man wisdom. Two thousand years later, the French scholar, Francois Fenelon, adapted the story of Telemachus in a novel, enlarging and popularizing the character of Mentor.

Mentoring Defined

Mentoring can be defined as the relationship between two people, one more experienced than the other, that allows the experienced person to help the other work toward goals related to his or her professional and personal growth. The more experienced person, the mentor, acts as an adviser, role model, and guide. The less experienced person, the mentee, acts as a student or protégé.

The mentor teaches, advises, or counsels the mentee depending on the mentee's developmental needs. The mentee seeks advice, counsel, and sometimes training from the mentor about decisions, problems, and career-related situations he or she is facing. The mentee may also ask his or her mentor to help set performance and developmental goals.

Mentoring is not supervising, managing a mentee. Mentoring is an intentional and formal relationship in which both individuals' goal is to develop the mentee. Furthermore, mentoring is supported by the commitment of the mentor and mentee to their goal and the confidentiality of their discussions.

Classic Mentoring is...	Not Mentoring
<ul style="list-style-type: none"> For professional and career development 	<ul style="list-style-type: none"> Job hunting or draining others network
<ul style="list-style-type: none"> Purposeful meetings 	<ul style="list-style-type: none"> Meetings without purpose
<ul style="list-style-type: none"> Long range behavior reinforcement 	<ul style="list-style-type: none"> Short term information-only sessions
<ul style="list-style-type: none"> Navigating unwritten rules of the culture 	<ul style="list-style-type: none"> Supervising one's work
<ul style="list-style-type: none"> Sharing of industry expertise 	<ul style="list-style-type: none"> Lecturing (one way interaction)

Participant Eligibility

Mentor Qualifications

A wise and trusted coach, counselor or teacher (aka Sage, Wizard, Yoda). A Mentor provides guided autonomy and encourages the mentee to develop their ideas.

- Able to dedicate up to one hour a month for meetings
- Able to discuss a wide range of business related issues
- Able to give effective feedback, both positive and constructive
- Active chapter membership
- Advocate for the chapter and can reinforce its services
- Background within a talent development role
- Capable teacher, advisor, listener and coach
- Comfortable being a role model
- Has industry knowledge and experience
- Interacts well with others and promotes teamwork with cross-functional collaboration
- Monthly or ongoing engagement with mentee
- Willingness to help identify goals, to coach and give feedback.
- Willingness to share personal experiences relevant to the goals of the mentee,

Mentee Qualifications

A person that is being mentored is known as the mentee (aka protégé, apprentice, and understudy). He or she is responsible to learn and most importantly, to apply new learning to personal and professional growth. Mentees must enter into the mentoring relationship having a majority of the following:

- Able to dedicate up to one hour a month for meetings
- Active chapter membership
- Active listening skills
- Commitment and desire to grow
- Genuine interest in professional and personal growth
- Highly interested or currently within a talent development role
- Keeps commitments to participate during the program
- Monthly or ongoing engagement with mentor
- Must complete MENTEE APPLICATION to be considered
- Openness and receptiveness to receiving feedback and coaching
- Self-management skills
- Willingness to develop a sense of self and personal vision

This is a value added development program for participants in our industry. Mentees should not use their mentor for job-hunting service or expect to rely on the mentor's network for job placement.

The Mentoring Relationship

First and foremost, successful mentoring relationships are grounded in trust, respect and mutually agreed-upon goals. A mentor must have a genuine interest in helping others, including a willingness to make the necessary time commitments. Mentors should be successful, well-connected and possess good communication skills.

Selection of Mentoring Partners

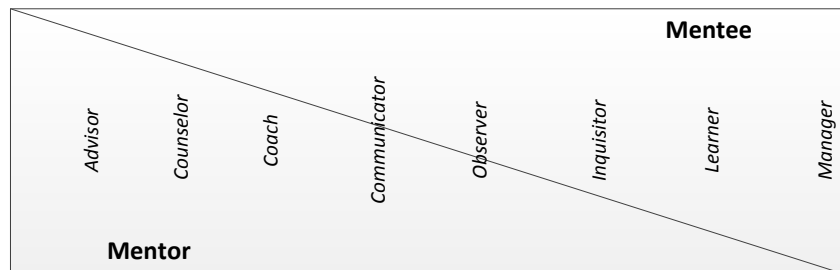
Using a pair of walking shoes as a metaphor, the partners have to 'fit' if the relationship is to work. Therefore, not only should the mentor have the experience and knowledge that the mentee seeks, but some degree of chemistry needs to exist between the two people in order for there to be a comfort level to speak freely and without embarrassment or fear. Both halves of the relationship should look forward to working with the other.

Often, people are paired up because of a skill match, but other factors keep the relationship from rewarding each of the participants to the desired level. This could be a lack of respect, of difference in style, or one of a hundred other reasons.

Expectations and Responsibilities

The mentee is responsible for driving the process. Why? Because, while the mentor and mentee both should enter into the relationship with a certain level of willingness and enthusiasm, the mentee is the one making the request of what the mentor has.

Mentoring Roles



Mentee Roles

You will take on different roles throughout the mentoring relationship. They may include:

- Learner – seeking advice, guidance, direction, and opinions
- Observer – observing preferences, habits, and patterns within the organization
- Inquisitor – comparing and discussing organizational similarities/differences with your mentor
- Manager – taking control of your growth and development

Mentor Roles

There are roles that a mentor plays during the mentoring relationship. They may include:

- Communicator – encouraging two-way communications
- Counselor – working with mentees to identify career-related skills, interests, and values
- Coach – helping to clarify goals and developmental needs, proposes self-exploration, and reinforcing performance
- Adviser – communicating career related information, making recommendations training and career direction

Make Mentoring MEMORABLE

Mentoring can be magical when two people have a commitment to self-discovery and growth. When done well, the mentoring experience will be memorable.

Mutual Trust - an ideal mentor is not one's boss. It is difficult to maintain an objective, nonjudgmental dialogue when a formal reporting relationship exists.

Expand and Challenge Thinking – set the stage for the mentee to be open to new ideas and to make personal changes. Both failure and success are great teachers. Mentor 'war stories' offer powerful insight.

Meaningful Feedback – agree in the onset of relationship that feedback must exist for learning to occur. Be sensitive to mentee's ego and keep criticism constructive and in a positive manner while giving specific examples of behavior. Confidence must be maintained if people are to develop.

Offer Alternatives – mentoring focuses on expanding one's view through sharing of another's perspective, knowledge and experience. The mentor should pose questions to uncover assumptions and then offer options for the mentee to test his or her analytical and problem-solving skills.

Reflection – try to get the mentee to reflect on how others respond to him or her and why. An effective relationship will help the mentee reflect on past employment and education choices; clarify perceptions and examine personal limitations.

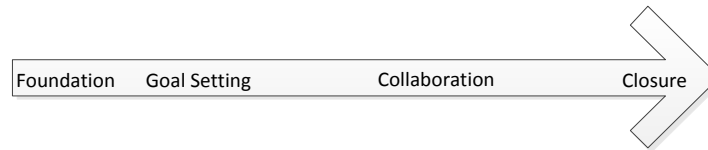
Action Plan – a documented action plan on what is to be achieved during the timeframe designated will provide the structure to ensure success. An action plan will also provide focus on the objective of the relationship, so when the conversation wanders off course a bit; it can find its way back to the goal.

Be Selfless – mentors should enter agreements with mentees because they have the passion and desire to help someone develop and grow. A mentor's focus should be on motivating and inspiring the mentee, and not for their own gain.

Learn from Each Other – mentors and mentees should learn from each other. Empathetic and self-aware mentors are constantly assessing their own effectiveness. The reverse mentoring concept is a perfect example of this

Extend the Development – Mentoring relationships should always have a timeframe, so that learning occurs by a certain date. When the contract is near its end, the mentor should discuss a transition to the next logical steps towards the mentee's career goals.

Mentoring Phases



The mentoring relationship typically has four distinct phases, and all participants must be available for the entire cycle:

Setting the Foundation Phase

During the first to second meeting, both the mentor and mentee are getting to know each other, and building trust. At this time, both the mentee and the mentor are developing expectations of each other. The interaction that occurs at this stage will lay the foundation for a strong and beneficial relationship.

Goal Setting Phase

The goal phase is typically the most rewarding time for both mentor and mentee. The mutual trust, which has developed between the two, can give the mentee the confidence to process and challenge the ideas of the mentor, just as the mentor will process and challenge the mentee's ideas.

Collaborating Phase

This phase can be likened to nurturing growth as the seeds take root. It takes longer to complete than the other phases, as it is the implementation phase of the relationship – this is where the hard work must be done.

Closure Phase

The mentor-mentee relationship enters a closing phase, where both parties can determine the best way to disconnect from the formal stages of the mentoring process. They may choose to continue to have some form of interaction, although it is now on a more casual, informal, basis.

Setting the Foundation Phase

If a mentor and mentee do not have an existing relationship, here are some suggestions for breaking the ice:

- Informal Coffee or Lunch – kick-off the relationship by learning about each other’s backgrounds and interests. Focus on the mentee’s Goal Achievement Sheet.
- Invite Mentee to a business function. Good opportunity to meet colleagues in various industries and network.
- Informal Outing – Meet at a chapter meeting or learning event

Effective Outcomes for Mentee	Effective Outcomes for Mentor
<ul style="list-style-type: none"> • Increased Confidence 	<ul style="list-style-type: none"> • Fulfillment and satisfaction of helping others
<ul style="list-style-type: none"> • Greater awareness of organizational politics & culture 	<ul style="list-style-type: none"> • Making a difference to the chapter
<ul style="list-style-type: none"> • Appreciation and effective use of networking 	<ul style="list-style-type: none"> • “Payback” for the support received from others in the past
<ul style="list-style-type: none"> • Improved organizational performance 	<ul style="list-style-type: none"> • Professional relationship with a colleague
<ul style="list-style-type: none"> • Expanded effective communication skills 	<ul style="list-style-type: none"> • Mentors can leave a lasting legacy.
<ul style="list-style-type: none"> • Increased flexibility with communication style 	<ul style="list-style-type: none"> • Agility with handling challenging situations

Setting Boundaries

Setting boundaries is healthy for both you and those around you. You will have different boundaries with different people in your life. It is important that you are aware of what those boundaries are so those around you understand your limitations.

Boundaries provide a structure for your interactions. Consider the following:

- Discuss and agree how to stay in contact with each other, include: when and where
- Discuss your preferred method of interaction: phone, face to face or use of electronic tools
- Discuss consequences for not attending the agreed upon meetings or tardiness
- Discuss limitations you may have with your role as a mentee or mentor
- Discuss how to handle conflict or disagreement before it happens

Your First Meeting

The goals of the first meeting are to:

- Review the Program Objectives and Guidelines.
- Review the process of SMART goal setting.
- Review the calendars & talk about the milestones and check-ins.
- Describe how the matching decisions were made.

Discuss your thinking about the roles of “mentor” and “mentee” and establish clear expectations of each other.

- Begin to determine learning styles.
- Clarify needs, learning steps, and checkpoints.
- Consider the SMART goals.
- Review the feedback process.
- Set boundaries

During Your First Mentoring Session:

Mentor	Mentee
<ul style="list-style-type: none"> • Put your mentee at ease by introducing yourself 	<ul style="list-style-type: none"> • Introduce yourself and your background
<ul style="list-style-type: none"> • State your commitment to your mentee’s success 	<ul style="list-style-type: none"> • State your commitment to professional growth.
<ul style="list-style-type: none"> • Move the conversation forward 	<ul style="list-style-type: none"> • Discuss your strengths.
<ul style="list-style-type: none"> • Discuss your mentee’s goals. Assist with clarification (and narrowing if advisable) of the goals, and discuss goal strategies 	<ul style="list-style-type: none"> • Bring written goals
<ul style="list-style-type: none"> • Get to know your mentee better 	<ul style="list-style-type: none"> • Relax; take time to get to know your mentor better.

Goal Setting Phase

The SMART methodology for writing goal statements can also be very helpful as you work to focus the mentees objectives. SMART goal statements include these elements:

- S (Specific)
- M (Measurable)
- A (Attainable)
- R (Relevant)
- T (Time Bound)

The purpose of the SMART goal is to identify what you will accomplish by when. This is followed by strategies or objectives to define the “how”.

” On September 2, 2009 deliver a 4 hour training program on time management for a team of 20 people, receiving an average of 4.0 or higher on the evaluations demonstrating success..”

SMART goals will only be effective if strategies, or individual steps, are determined so that the goal can be achieved.

Possible strategies for the example mentee goal listed are:

“Create an outline of the program by July 15, 2009.

“Review the program with the managers to assure the content is as desired by July 31, 2009”

“Deliver a practice run to elicit feedback by August 15, 2009.”

Additional examples of SMART goals are:

“By October 15, 2009 create a resume, business card and cover letter template to be used to acquire a position in training in the banking industry.”

“By November 30, 2009 identify the key competencies required for the next level position and present documentation to the manager demonstrating success in those areas and requesting consideration for promotion.”

Collaboration Phase

After your first meeting to clarify goals and strategies, you will fall into your regular, monthly meeting schedule. The focus will be to discuss progress made toward achieving the goals and determine if any adjustments are needed.

If any difficulties arise and you need assistance, do not hesitate to contact the program coordinator at human resources. Their role is to assist you in these situations.

Tips for Mentors

- Visit your mentee's workplace if invited
- Use your own learning experiences as examples
- Kindly confront negative behaviors that could derail progress
- Give feedback with respect and sensitivity as needed
- Key in on frustrations or anger as opportunities for learning
- Identify and verify your mentee's perceptions
- Relate new ideas to your mentee's past experiences
- Relate new ideas to your mentee's goals

Tips for Mentees

- Drive the process with input from your mentor.
- Share work samples with your mentor and seek feedback.
- Bring a list of questions with you to each meeting.
- Take detailed notes at each meeting (decisions, next steps, etc) and document your progress toward your goals.
- Invite your mentor to an event at your place of work.
- Try on new behaviors and ask for feedback.
- Share key experiences and learning.
- Kindly confront negative behaviors that could derail progress.

Career Planning

The mentor possesses the wisdom that only experience can provide. It's not uncommon for the mentee to want to move up the career ladder or seek new employment opportunities, usually following in the footsteps of the mentor. The mentor usually shares their experiences and helpful advice, but in the end it should always be up to the mentee to develop a plan and make career related decisions.

NOTE: Mentees should not rely on their mentor for job placement.

Career Related Guidance

Participants can use these questions at one-on-one meetings to probe and learn more about the mentees career aspirations. Allowing the mentee to reflect on exactly what he or she wants will ensure the mentee is accountable for their plan.

Questions

- Are there fields of work you've heard about and how are you exploring them?
- How do you prepare for job interviews?
- How long do you expect to stay in your field?
- How prepared are you with the skills you need to succeed? What is missing?
- How satisfied are you with the work you've completed in the past?
- What am I doing or not doing that is preventing me from getting to the next level?
- What are your prominent strengths and how are you using them in your work?
- What do others think about your career?
- What do you think is preventing you from advancing your field?
- What do you think is the biggest problem with your career?
- What do you think is the biggest success with your career?
- How can I retire and transition out of the workforce?
- What energizes you with the work you are doing? If not what types of changes are you going to make?
- What is your vision of success and how close are you to achieving it?

Closing Phase

The closure phase of the mentoring relationship presents the greatest challenge to individuals involved in the partnership. The reasons are many. Often, closure is taught with anxiety and/or surprise. Even know closure may have been planned, relationships can end earlier than anticipated.

Sometimes partners hang on indefinitely, neither wanting to let go. It may be inertia, comfort, or desire not to offend that keeps a mentoring relationship afloat. More often not, particularly in a planned mentoring program, the specified end point of the relationship simply arrives as scheduled.

Be proactive.

Don't wait until the end to begin! Agree on how you will come to closure when you first negotiate your mentoring partnership. Discuss and plan how you will come to closure -- if it is planned or unplanned. Set ground rules for having the discussion. Make one of those ground rules an agreement to end on good terms.

Parting on a Good Note

Provide opportunities for saying goodbye in a healthy, respectful and affirming way. Don't wait for the very last meeting with their mentees to say goodbye. The mentor and mentee should slowly bring it up as soon as he or she becomes aware that the relationship will be coming to a close.

Resources List

Activities

- **Informational interview:** The mentee prepares questions and meets with someone that has mastery in a skill to ask questions about their experiences and lessons learned. This meeting length is about 1 hour.
- **Knowledge transfer:** The mentee meets with a highly skilled subject matter expert to observe a technical skill or operational process. The meetings are based on the mastery of the skill or process. In most cases 1-3 meetings can be prescribed.
- **On the job training:** A form of knowledge transfer that is conducted in the actual workplace or real environment, not the classroom. Traditionally includes explaining how to perform processes and transactions used in the department.
- **Training:** Traditionally this is when a new behavior or skill (technical and soft) is delivered at a group meeting or in a classroom setting.
- **Resume Exchange:** The mentor and mentee swap resumes and discuss highlights from each. The conversation should be focused on the achievements, career strategies and business rational.

Reading

- Beyond the Myths and Magic of Mentoring, Margo Murray (1991)
- Coaching, Mentoring and Managing, William Hendricks (1996)
- Everyone Needs a Mentor: Fostering Talent in Your Organization, D. Clutterbuck (2004)
- Mastering Mentoring and Coaching with Emotional Intelligence, Merievede & Bridoux (2004)
- Mentoring for Exceptional Performance, Harold Johnson (1997)
- Mentoring: Helping Employees Reach Their Full Potential, Gordon Shea (1994)
- Mentoring: The Most Obvious Yet Overlooked Key to Achieving More in Life than You Ever Dreamed Possible, Wickman & Sjodin (1997)
- The Manager's Pocket Guide to Effective Mentoring, Norman Cohen (1999)
- The Mentoring Advantage: Creating the Next Generation of Leaders, F. Stone (2004)

Participant Forms

GOAL ACHIEVEMENT SHEET

Mentee Name: _____ Mentor Name: _____

Short Term Career Goal	Date
Click here to enter text.	Enter text.
Click here to enter text.	enter text.

Long Term Career Goal	Date
Click here to enter text.	enter text.
Click here to enter text.	enter text.

My Mentor Can Assist Me By: (check all that apply)

✓	Indicators of Success
	Application of new knowledge
	Applied feedback about my approaches
	Change in particular behavior(s)
	Increased understanding, knowledge, awareness of professional competencies
	New ability to explain and /or demonstrate skills
	Realizing a clearer vision and steps for my future
	Click here to enter text.

MENTORING PROGRAM AGREEMENT

We are both voluntarily entering into this professional mentoring partnership. We wish this to be a rewarding experience, spending most of our time discussing developmental activities.

We agree to the following:

- When schedule permits, attend chapter meetings and events.
- Prepare and use an agenda for our meetings.
- Explore new professional territory together.
- Keep the content of these meetings confidential.
- Make time for the program, without excuses.
- Mentee remains open to the feedback.
- Engage in two-way conversations (refrain from lectures/pontification).
- Mentor gives honest, tactful, constructive feedback to the Mentee.
- Remain engaged and focused throughout the cycle.
- Respect personal boundaries.
- Meet at least once every month.
 - Meeting times should not be cancelled unless this is unavoidable.
 - At the end of each meeting, select the next date for the next meeting.
- In between meetings, connect via email, text or telephone, as needed.
- Focus on career and skills development and not job placement.