

MENTORING GUIDE

A Guide for Protégés



Center for Health Leadership & Practice
A Center of the Public Health Institute

Mentoring Guide

A Guide for Protégés

Center for Health Leadership & Practice
Public Health Institute
Oakland, CA

November 2003

This Mentoring Guide is based on materials originally developed by the Center for Health Leadership & Practice, Public Health Institute, for the State Health Directors Executive Mentoring and Consultation Program of the State Health Leadership Initiative (SHLI). The SHLI is administered by the National Governors Association with funding provided by the Robert Wood Johnson Foundation.

About the Author

The Center for Health Leadership & Practice (CHLP), a Center of the Public Health Institute, is based in Oakland, CA. CHLP has been engaged in leadership development enterprises (international, national, and California-based) since 1991.

Our programs and consultation services include:

- Custom-designed leadership development strategies and curricula
- Workshops, retreats, and presentations including collaborative leadership, team dynamics, and cultural proficiency
- Senior level team building and strategic planning
- Customized mentoring programs, and training in coaching and mentoring skills
- Succession planning strategies for leaders, team members, and human resources personnel
- Adult learning approaches, assessment tools, and train the trainer programs to build organizational capacity

For further information about CHLP's activities and services and to order additional copies of this guide and its companion, please contact us at:

Center for Health Leadership & Practice
Public Health Institute
555 12th Street Suite 1032
Oakland, CA 94607
Tel: 510-285-5586
Fax: 510-285-5587

Office@cfhl.org www.cfhl.org

Table of Contents

| | |
|--|-----------|
| What is Mentoring | 1 |
| How Do I Find A Mentor? | 1 |
| Key Mentoring Skills | 3 |
| Stages of Formal Mentoring Relationships..... | 6 |
| Stage I: Building the Relationship | 6 |
| Stage II: Exchanging Information and Setting Goals | 7 |
| Stage III: Working Towards Goals/Deepening the Engagement | 7 |
| Stage IV: Ending the Formal Mentoring Relationship and Planning for the Future..... | 9 |
| Appendix I Mentoring Best Practices..... | 11 |
| Appendix II Mentoring Goal Form..... | 12 |
| Appendix III Selected Annotated Bibliography..... | 15 |

What is Mentoring?

In *The Odyssey* (written by Homer, a Greek poet), Odysseus (known as Ulysses in the Latin translation) was preparing to fight the Trojan War when he realized he would be leaving behind his only son and heir, Telemachus. Since the child was young and wars typically dragged on for years (the Trojan War lasted 10 years), Ulysses entrusted Telemachus' care and education to Mentor, his wise, trusted friend.

Today, mentoring is a process in which an experienced individual helps another person develop his or her goals and skills through a series of time-limited, confidential, one-on-one conversations and other learning activities. Mentors also draw benefits from the mentoring relationship. As a protégé (a person being mentored), you will have the opportunity to gain wisdom and input and evolve your thinking about the issues affecting you as you develop a relationship with a mentor.

How Do I Find A Mentor?

There are many kinds of mentoring relationships, ranging from informal to formal. An *informal mentoring relationship* usually occurs in a spontaneous format. (Think of times you have been helped by someone more experienced than you without explicitly asking to be mentored.) Informal mentoring may also occur within the context of other relationships such as a supervisory relationship or even peer relationships. A *formal mentoring relationship* is characterized by its intentionality – the partners in the relationship ask for or offer the mentoring, establish goals for the relationship and make agreements about its nature. There are also mentoring programs that facilitate formal mentoring relationships. A “*facilitated*” *mentoring relationship* has been defined as “...a structure and series of processes designed to create effective mentoring relationships; guide the desired behavior change for those involved; and evaluate the results for the protégés, the mentors and the organization.”¹ These mentoring relationships occur within a structured and defined framework and involve a third party. Often these programs have a specific goal such as helping participants develop their careers.

Mentoring relationships can occur at all professional levels. The key feature of a mentoring relationship is that a more experienced individual helps another achieve his or her goals and develop as a person. The mentor may help you develop specific job skills or leadership capacities. The mentor may work in your

¹ Murray, M. *Beyond the Myths and Magic of Mentoring: How to Facilitate an Effective Mentoring Process*. San Francisco: Jossey-Bass Inc., 2001.

organization, have experience in your organizational context, or have experience in the same field.

Those seeking a mentor have a number of options. There may be a formal mentoring program in place in your organization, community or specific discipline. When pursuing a mentor outside of the context of a mentoring program, we recommend taking a look at the many excellent resources available on mentoring. (See Appendix III.) Before approaching a potential mentor, it helps to ask yourself these questions:

- What do I hope to gain from a mentoring relationship?
- What kind of mentor am I interested in? (e.g. in my organization, my field, with specific skills/experiences)
- What are the potential barriers to embarking on a mentoring relationship? (i.e. time constraints)

Once your goals for the mentoring relationship have been defined, develop a list of potential mentors. Approach the potential mentor by articulating your goals and expectations for the relationship and why you think he/she could be of help to you. When you embark on your mentoring relationship, use this guide to plan your interactions and build your mentoring skills. A companion guide, *Mentoring Guide: A Guide for Mentors*, is available for mentors. (See Appendix III.)

This guide will help you develop the skills you need to make the most of your mentoring relationship, whether formal or informal. Although mentors can be sought for various spheres of life, this guide focuses on mentoring within a professional context. The guide's format is intentionally simple and brief to facilitate its use by busy people.

Key Mentoring Skills

The mentoring literature shows that mentors and protégés tend to employ certain mentoring skills. Research also indicates that these skills can be developed, and that particular skills or competencies seem to result in the most successful mentoring relationships. Linda Phillips-Jones, Ph.D., mentoring expert and author of *The New Mentors & Protégés: How to Succeed with the New Mentoring Partnerships*, and numerous guides and tools for mentors and protégés (see Appendix III), studied hundreds of mentor-protégé relationships and developed a set of critical mentoring skills and competencies. The key mentoring skills discussed here are adapted from her work.

| KEY MENTORING SKILLS |
|----------------------------------|
| <i>Listening Actively</i> |
| <i>Building Trust</i> |
| <i>Determining Goals</i> |
| <i>Encouraging</i> |
| <i>Learning Quickly</i> |
| <i>Managing the Relationship</i> |

You will likely recognize the skills outlined here and may have experience employing them successfully in other relationships. As you progress through your mentoring relationship, try to employ these skills whenever possible.

1. **Listening Actively**

Listening actively is the most basic skill you will use throughout your mentoring relationship. Active listening not only establishes rapport but creates a positive environment that permits open communication. By listening actively, you will grasp all your mentor teaches you, and you will also make him or her feel especially valued by you. Examples include the following:

- Show interest in what your mentor is saying and reflect back important aspects of what he or she has said to show that you've understood;
- Use body language (such as making eye contact) that shows you are paying attention to what your mentor is saying; and

- If you are talking by phone, reduce background noise, and limit interruptions. Your mentor will have an easier time giving you his or her undivided attention.

2. Building Trust

Trust is built over time. You will increase trust by keeping your conversations and other communications with your mentor confidential, honoring scheduled meetings and calls, consistently showing interest in the mentoring relationship, and by being open and honest.

3. Determining Goals

Reflect on your career, personal vision, and goals and share these with your mentor. It is likely that he or she will ask you about them. In addition to your career and personal goals, you will also want to set goals for the mentoring relationship.

You will develop your capacity for achieving your goals by doing the following:

- Knowing what your goals and priorities are;
- Understanding your strengths, weaknesses, successes, and challenges;
- Helping your mentor understand your responsibilities and the context in which you work; and
- Discussing actions that you've taken in your career, explaining your rationale, and inviting feedback.

4. Encouraging

According to Dr. Phillips-Jones' research, giving encouragement is the mentoring skill most valued by protégés. Mentors also respond well to positive reinforcement. You'll find that your mentor will offer you encouragement and support for the challenges you face. You can contribute to a mutually encouraging, supportive relationship by:

- Expressing appreciation;
- Letting your mentor know how you've benefited from the mentoring relationship;

- Pointing out concrete examples of how you've utilized his or her guidance and input.

5. Learning Quickly

Mentors report being highly motivated by protégés who learn quickly and well. You can demonstrate this skill with these techniques:

- Asking appropriate questions to clarify what your mentor is teaching or suggesting;
- Applying the information and strategies he or she offers and reporting back on how you made the applications;
- Pursuing useful learning opportunities and resources on your own; and
- Going beyond what your mentor suggests—taking his or her ideas and showing creative or ambitious ways of using them.

6. Managing the Relationship

As a protégé, you should take the lead in managing your mentoring relationship. This includes scheduling meetings, determining their focus, paying attention to the relationship itself, and deciding when the formal aspect of the relationship should end. You can manage your relationship by:

- Scheduling your mentoring meetings well in advance and proposing an agenda before each one;
- Checking with your mentor on his or her satisfaction with the pacing, focus, and content of your relationship as well as any relationship issues the two of you should address; and
- Analyzing the status of your relationship and determining where to go next with it.

Reflecting on your mentoring practice, noting use of the key mentoring skills, observing progress made in the relationship, and requesting feedback are excellent ways to assess whether you are employing these skills.

Stages of Formal Mentoring Relationships²

Like most relationships, mentoring relationships progress through stages. Your formal mentoring relationship will likely reflect four developmental stages with each stage forming an inherent part of the next:

- I. Building the Relationship
- II. Exchanging Information and Setting Goals
- III. Working Towards Goals/Deepening the Engagement
- IV. Ending the Formal Mentoring Relationship and Planning for the Future

There is no strict formula for determining the length of each of these stages. In a year-long relationship, for example, Stages I and II typically unfold during the first three or four months of the relationship. The relationship typically winds down in months eleven and twelve. (Options for continuing the relationship in a less formal way are addressed in Stage IV.)

The sections that follow discuss practical activities for progressing successfully through each stage.

Stage I: Building the Relationship

During this phase, you will get to know each other and begin to establish trust.

During your first meeting (ideally face-to-face), discuss your backgrounds, experiences, interests, and expectations. Make agreements about confidentiality and the frequency of contact, and explore potential times to meet.

During this first stage, it is important to establish a schedule for communicating regularly, whether in-person or by phone or e-mail.

² Phillips-Jones, L. (2001) Personal communication. Adapted from CCC/The Mentoring Group's Mentor and Mentee training materials.

There are a number of topics you may want to focus on during your second meeting:

- Tell your mentor a little more about yourself, your skills, your organization and community, the political environment, some of your key challenges, etc.
- How you have benefited from other mentoring relationships
- What some of your preliminary goals for the mentoring relationship are

Stage II: Exchanging Information and Setting Goals

During Stage II, you will exchange more information and set goals. Your trust will deepen.

As the mentoring relationship unfolds, practice listening actively and positively reinforcing your mentor for her/his time, effort, insights, introductions to others, etc.

Setting Goals:

By exchanging information, you will gain insight into the goals you hope to achieve through the mentoring experience. For example, you may wish to improve your skills in a particular area. Alternatively, you may seek your mentor's guidance on a major decision or change. Mentors and protégés typically discuss a great variety of issues and challenges.

Goals are helpful because they help you see beyond the day-to-day demands of your job and help you gain clarity on how to get the most out of the mentoring relationship. Write down and discuss your goals for the mentoring relationship. (See Appendix II.) Refer back to your goals periodically as a way of re-focusing on goals and measuring progress.

Stage III: Working Towards Goals/Deepening the Engagement

During Stage III, which is typically the longest, you will work towards achieving your goals through conversations, written materials provided by your mentor, trying various learning and development activities, and perhaps connecting with other resource people your mentor introduces you to. This is a rich phase marked by openness and trust, meaningful discussion, application of new insights and approaches, and ongoing support. (See Appendix I for Mentoring Best Practices.) You may find that your mentor challenges you to think in new ways or approach a problem differently.

This is a good point in the journey to reflect with your mentor on progress towards goals and on the relationship itself. Consider discussing the following:

- What are the benefits of the relationship up to this point? How is your mentor helping you achieve your goals?
- What changes do you see in yourself and the way you approach your work as a result of the mentoring relationship?
- What kinds of adjustments or changes, if any, are needed in your goals or in the relationship?

This is also the stage during which energy in the relationship tends to wane! You may feel concerned that you are burdening your mentor. Your other responsibilities will often compete with your commitment to the mentoring relationship. Take stock of your time and energy. Is the partnership working well for you? Do you need to make some adjustments?

This is a highly rewarding phase of the relationship, but challenges may arise. Here are some examples of challenges other protégés and mentors have faced and resolved.

- **Time and energy.** The most common challenge by far is finding sufficient time to do all you want to do in the relationship. Despite good intentions, other priorities interfere for both of you.

Solution: Think small rather than large, especially in the beginning. Even a brief phone call can be helpful. In the course of the relationship, check with your mentor to be certain you are both comfortable with the time you are spending, the intensity of the relationship, and the learning that is occurring.

- **Building trust quickly.** With only a few of hours of contact each month, it is not easy to build the kind of trust you both would like.

Solution: Other protégés and mentors have successfully used several strategies, such as the following: Listen very carefully, and remember what your mentor has said in the past. (You might want to keep a journal.) Keep your commitments -- if any need to be changed, reschedule or renegotiate them. Avoid talking negatively about others. Above all, keep the confidences your mentor shares with you.

- **Expecting your mentor to be the “expert”.** Many mentors find it difficult when they do not have all the answers.

Solution: View your mentor as a “learning facilitator”. Tell him or her that you know he or she will not have all the answers, and you are looking forward to learning together as well as seeking help from others who are more expert on different topics.

- **Being sensitive to differences.** Particularly in the beginning, it is tempting to assume that both of you are the same. In fact, you will share many experiences. Explore and learn from your differences as well.

Solution: In addition to discovering all your similarities, work carefully to identify the differences between you and your mentor. For example, how did the specifics of his or her position differ from the role you play? What do you face that he or she did not? If you are of different generations/ages, genders, races, cultural groups, or professional backgrounds, what different experiences have you both had? Assume a learning mode, and invite discussion about all of these topics. As Stephen Covey reminds us in **Seven Habits of Highly Effective People**, “Seek first to understand.”

Stage IV: Ending the Formal Mentoring Relationship and Planning for the Future

During this stage, planning for your continued success is balanced with bringing the formal mentoring relationship to a close. Work with your mentor to define the types of support you may need in the future. He or she may want to connect you with additional colleagues who can provide benefits other than those provided to you. This is also a good time to explore your own interest in one day mentoring someone.

Adjournment brings closure to the journey. Your final discussion should be dedicated to the following:

- Reflecting on accomplishments, challenges, and progress towards goals;
 - What will you remember most about the relationship?
 - What challenges lie ahead?
- Exploring other types of support you may still need;
- Discussing whether the relationship will continue informally (and how you will implement it); and
- Expressing thanks and best wishes!

Appendix I

Mentoring Best Practices

- Think of your mentor as a “learning facilitator” rather than the person with all the answers. Be open to using a variety of resources and discussing your findings with your mentor.
- Seek discussion and input rather than advice. Look to your mentor to help you think more broadly and deeply.
- Apply the knowledge shared with you and discuss its application.
- Be open to your mentor’s efforts to help you see alternative interpretations as well as approaches to decisions and actions.
- Remember that you are responsible for your own growth. If your mentor’s style leans toward managing the relationship and directing your development, speak up diplomatically and maintain control.
- Be receptive to receiving constructive feedback.
- Ask your mentor to share with you successful strategies and resources he or she has used in the past that could apply to the challenges you face.
- Enjoy the mentoring experience. Know that the energy you invest will likely have a significant impact on your development. Your mentor will also grow from the experience.

Appendix II

MENTORING GOAL FORM*

Name: _____ Date: _____

What do you want to achieve through engaging in the mentoring relationship? Complete this form and discuss your goals with your mentor. Examine your goals periodically, and discuss your progress made.

Goal #1:

Benefits to You:

Benefits to Your Program/Organization/Community:

Potential Barriers to Success:

Resources/Support Needed to Achieve Goal:

* Adapted from Leadership Enterprises (www.leadershipenterprises.com)

How Progress Will Be Measured:

Goal #2:

Benefits to You:

Benefits to Your Program/Organization/Community:

Potential Barriers to Success:

Resources/Support Needed to Achieve Goal:

How Progress Will Be Measured:

Goal #3:

Benefits to You:

Benefits to Your Program/Organization/Community:

Potential Barriers to Success:

Resources/Support Needed to Achieve Goal:

How Progress Will Be Measured:

Appendix III

Selected Annotated Bibliography

Mentoring

Bell, C. R. (1998) ***Managers as Mentors***. San Francisco, CA: Berrett-Koehler Publishers. Chip Bell's approach to mentoring embodies development for the protégé and the mentor as well as important psychological principles of interpersonal development. Bell's approach is suitable for individuals at differing levels of both work and mentoring experience.

Center for Health Leadership & Practice (2002) ***Mentoring Guide: A Guide for Mentors***. Oakland, CA: Center for Health Leadership & Practice, Public Health Institute. This is the companion guide to *Mentoring Guide: A Guide for Protégés*. Available at www.cfhl.org.

Cohen, N. (1999) ***Effective Mentoring***. Amherst, Massachusetts: HRD Press. This practical small pocket guide provides quick access to basic mentoring concepts and techniques. It supports the developmental approach to mentoring relationships, i.e. the need to be aware of mentor behaviors, importance of maintaining/monitoring the relationship via written documentation, etc. Critical keys to successful mentoring are clarity of goals and making connections.

Murray, M. (2001) ***Beyond the Myths and Magic of Mentoring: How to Facilitate an Effective Mentoring Process***. San Francisco: Jossey-Bass. Provides models and guidelines for designing, implementing and evaluating a facilitated mentoring process within organizations. Includes useful tools and case examples.

Peterson, D.B. & Hicks, M.D. (1996) ***Leader as Coach***. Minneapolis, Minnesota: Personnel Decisions International Corporation. The authors approach coaching as a critical dimension of leadership. Many of the strategies, techniques, and models presented can be applied to mentoring relationships.

Phillips-Jones, L. (2000) ***The Mentor's Guide***. Grass Valley, CA: Coalition of Counseling Centers (CCC)/The Mentoring Group. Practical workbook for mentors. Includes Mentor's View of Mentoring Process, Frequently Asked Questions, Critical Mentoring Skills, Mentoring Etiquette, detailed Mentor's Checklist of Tasks, Sample Activities, blank and sample Mentor Plans, etc. Appropriate for new and experienced mentors.

Phillips-Jones, L. (2000) **The Mentee's Guide**. Grass Valley, CA: Coalition of Counseling Centers (CCC)/The Mentoring Group. Practical workbook for persons seeking or paired with mentors. Includes Mentee's View of Mentoring Process, Frequently Asked Questions, Critical Mentoring Skills, detailed Mentee's Checklist, Mentoring Etiquette, blank and sample Mentee plans, etc.

Phillips-Jones, L. (2001) **The New Mentors and Protégés: How to Succeed with the New Mentoring Partnerships**. Grass Valley, CA: Coalition of Counseling Centers (CCC)/The Mentoring Group. Describes how to find the right mentors and become a mentor for others. Includes numerous cases, how mentoring changed in the nineties, the new mentoring etiquette, and design ideas for planned mentoring.

Phillips-Jones, L. (2000) **"Strategies for Getting the Mentoring You Need: A Look at Best Practices of Successful Mentees."** Grass Valley, CA: Coalition of Counseling Centers (CCC)/The Mentoring Group. 14-page booklet for individuals looking for specifics on finding mentors. Used as career development resource for individuals in all levels of organizations.

Phillips-Jones, L. (1998) **"75 Things to Do with Your Mentees: Practical and Effective Development Activities You can Try."** Grass Valley, CA: Coalition of Counseling Centers (CCC)/The Mentoring Group. 12-page booklet of protégé development activities successfully used by mentors.

Shea, G.F. (1999) **Making the Most of Being Mentored: How to Grow from a Mentoring Partnership**. Menlo Park, CA: Crisp Publications, Inc. Offers information, exercises and self-study activities for protégés and people seeking a mentor.

Shea, G.F. (1996) **Mentoring: A Practical Guide**. Menlo Park, CA: Crisp Publications, Inc. A simple, middle manager level "how to" book on mentoring that effectively presents concrete, detailed activities and exercises. The author advances the notion that mentoring is the empowerment of the protégé by developing his or her abilities in a dynamic partnership.

Zachary, L. J. (2000) **The Mentor's Guide: Facilitating Effective Learning Relationships**. San Francisco, CA: Jossey-Bass. A comprehensive guide to developing successful mentoring relationships and programs. Includes useful examples and exercises.

Learning/Creativity

Dalton, M.A. (1998) **Becoming a More Versatile Learner**. Greensboro, North Carolina: Center for Creative Leadership. Versatility in learning and helping a

protégé understand the personal and even political power of that versatility can be critical to the success of a mentoring relationship. This 25-page book captures the expansion process of learning.

Gryskiewicz, S. (1999) **Positive Turbulence: Developing Climates for Creativity, Innovation, and Renewal.** Greensboro, North Carolina: Center for Creative Leadership. Sometimes a mentoring relationship can stall because of contextual factors for the protégé. This book is about changing climates -- from roles and relationships to economics and politics.

von Oech, R. (1990) **A Whack on the Side of the Head: How You Can Be More Creative.** New York, New York: Warner Books. This classic book is one of the best quick hits on trying to move to a different way of looking at something. Both clever and humorous, this book will help a protégé or mentor become more creative.

Personal Purpose/Direction/Meaning

Hakim, C. (1994) **We Are All Self-Employed: The New Social Contract for Working in a Changed World.** San Francisco, CA: Berrett-Koehler Publishers. Hakim presents a convincing case that everyone, whether self-employed or part of a large organization, is responsible for their own career success. He provides numerous ideas for how to discover one's passion and how to find or create satisfying work.

Leider, R.J. (1997) **The Power of Purpose: Creating Meaning in Your Life and Work.** New York, New York: MJF Books. Leider offers a compelling discussion of the call to work, a frequently identified topic between mentor and protégé. He provides a practical guide for creating meaning in your life and work. He focuses on living and working from the inside out, grounding soul work in the common practice of everyday life.

Leider, R. J. & Shapiro, D.A. (1996) **Repacking Your Bags: How to Live with a New Sense of Purpose.** New York, New York: MJF Books. Often revealed in a mentoring relationship is the dynamic of "I have no balance in my life between work and family." The authors present a step-by-step approach to help a person set down the unnecessary burdens carried in life and live with a renewed sense of purpose.

Interpersonal Relationships/Managing Conflict/Dealing with Politics

Scott, G. G. (2000) **Work with Me: Resolving Everyday Conflict in Your Organization.** Palo Alto, CA: Davies-Black Publishing. Significant time may be spent in a mentoring relationship discussing ways to handle power struggles,

politics of the work context, and friction with difficult people. Scott presents the model ERI (emotion, reason, and intuition) for managing these issues and dealing with politics.

Wall, B. (1999) ***Working Relationships: The Simple Truth About Getting Along with Friends and Foes at Work***. Palo Alto, CA: Davies-Black Publishing. No matter how good you are at what you do, the most important factor – and often the most frustrating challenge – in determining your success and satisfaction in the workplace is your ability to forge effective relationships with others. Often a topic of discussion in a mentoring relationship, this book offers excellent examples for handling the world of interpersonal relationships.