

# Fresno State

## MENTORING TOOLKIT



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# What is Mentoring?

*. . . a process where mentor and mentee work together to discover and develop the mentee's abilities.*

*. . . a long term relationship with a responsibility to provide the support, knowledge and impetus that can facilitate professional success.*

*. . . a personal process that combines role modeling, apprenticeship and nurturing.*

*The mentor will act as a teacher, sponsor, guide, exemplar, counselor, moral support—but most important is to assist and facilitate the realization of the dream.*

*. . . process whereby an experienced, highly regarded, empathic person (the mentor) guides another individual (the mentee) in the development and examination of their own ideas, learning and personal and professional development. The mentor, who often, but not necessarily, works in the same organization or field as the mentee, achieves this by listening and talking in confidence to the mentee.*

# Mentor Roles and Functions

Role	Responsibility	Relationship with Individual
Manager	Direct the work of the individual	<ul style="list-style-type: none"><li>• Focused on performance, professional development and career development</li><li>• Based on organizational needs</li><li>• Driven by learning agenda influenced by organizational needs</li><li>• Inside the hierarchy of direct reporting relationships</li><li>• Sometimes, but not always confidential</li></ul>
Sponsor	Champion the individual	<ul style="list-style-type: none"><li>• Focused on career development and advancement</li><li>• Driven by advancement goals rather than a learning agenda</li><li>• Inside or outside the hierarchy of direct reporting relationships</li><li>• Sometimes, but not always, confidential</li></ul>
Mentor	Guide and support the individual	<ul style="list-style-type: none"><li>• Focused on professional and personal development</li><li>• Based on mentee's expressed needs</li><li>• Driven by specific learning agenda identified by the mentee</li><li>• Outside the hierarchy of direct reporting relationships</li><li>• Confidential</li></ul>

# Mentoring Functions

## **Career Functions**

“Those aspects of a relationship that enhance advancement in the organization.”

- Coaching, protecting, networking, sponsorship

## **Psychosocial Functions**

“Those aspects of a relationship that enhance an individuals sense of competence, identity and effectiveness.

- Role modeling, counseling, confirmation, acceptance



# Why Mentoring Matters

## **Mentoring has been shown to:**

- Promote career development and satisfaction
- Improve success of women and underrepresented minorities
- Enhance productivity
- Increase interest in academic careers
- Predict promotion
- Improve self efficacy and professional development
- Lead to less work-family conflict

# Benefits of Mentoring



## **Benefits for Mentees**

Having a mentor and receiving more mentoring functions is associated with more favorable objective (compensation, promotion) and subjective (career/job satisfaction) outcomes

## **Benefits for Mentors**

Include developing a personal support network, information and feedback from protégés, satisfaction from helping others, recognition (including accelerated promotion), and improved career satisfaction



# Benefits of Mentoring

**For the University**

**Mentoring**

**Human resource development**

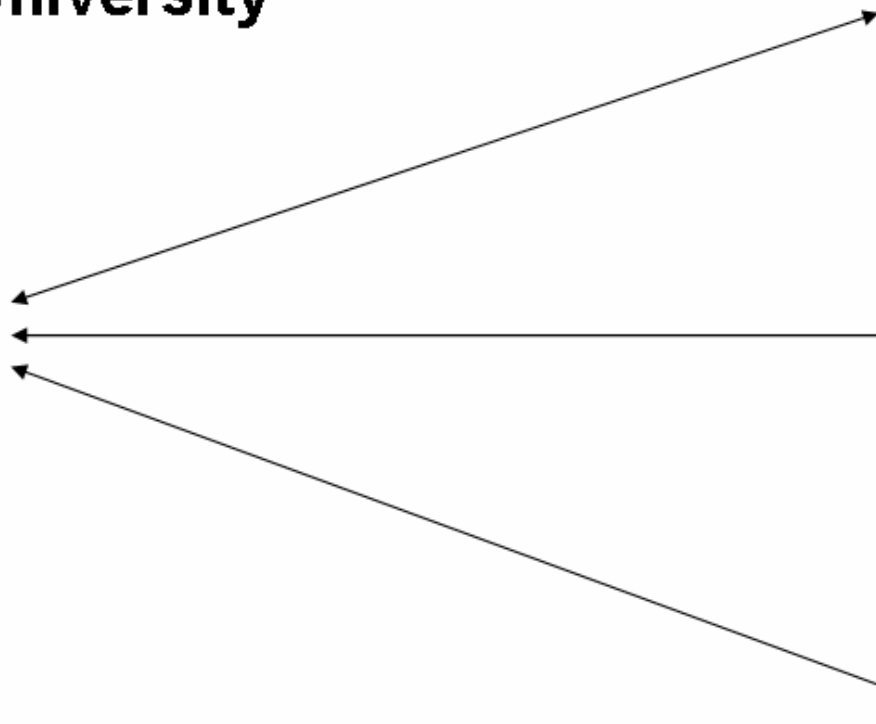
(improved job performance, retention, diversity)



**Enhancing organizational culture**



**Improving organizational communication**





# Characteristics of an Effective Mentor: The Three C's

## Competence

Professional knowledge and experience

Respect

Interpersonal skills and good judgment

## Confidence

Shares network of contacts and resources

Allows protégé to develop his/her own terms

Demonstrates initiative, takes risks

Shares credit

## Commitment

Invests time, energy and effort to mentoring

Shares personal experience

# Mentoring Partnership Agreement

As a mentor and mentee in the Fresno State Mentoring Program, we agree to abide by the following set of guidelines:

1. Commit to making the time to meet on a regular basis,
2. Keep the content of our conversations confidential.
3. Practice active listening.
4. Provide each other with honest, direct and respectful feedback.
5. Other:

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\_\_\_\_\_  
Mentor

\_\_\_\_\_  
Mentee

\_\_\_\_\_  
Date

# ***Individual Development Plan (IDP)***

## **Fresno State Mentoring Program**

**Instructions to Mentees:**

Please complete this form and give a copy to your mentor before your mentoring session. Attach an updated resume.

**Instructions to Mentors:**

Please review the mentee's res and this form prior to meeting your mentee.

Date:

Mentee Name:

Mentor Name:

## Mentoring Toolkit

### **Time Allocation as Estimated by Mentee:**

\_\_\_ % Administration/Other Services

\_\_\_ %

\_\_\_ %

\_\_\_ %

**How (if at all) would you like to change this time distribution?**

### **Classification**

Do you understand the classification to which you are appointed and the expectations for advancement?

\_\_\_ Yes

\_\_\_ No

**Explain:**

### **Current Professional Responsibilities**

List your major professional responsibilities and if you anticipate significant changes in the coming year:

1.

2.

3.

4.

5.

## Mentoring Toolkit

### **Future Professional Goals**

#### Short Term Goals

List your professional goals for the coming year. Be as specific as possible, and indicate how you will assess if the goal was accomplished (expected outcome).

1. Goal:

Expected outcome:

2. Goal:

Expected outcome:

3. Goal:

Expected outcome:

#### Long Term Goals

List your professional goals for the next 3-5 years. Again, be specific, and indicate how you will assess if the goal was accomplished.

1. Goal:

Expected outcome:

2. Goal:

Expected outcome:

3. Goal:

Expected outcome:

## Mentoring Meeting Journal

Use this page to record the discussion points in each of your mentoring meetings.

Date:
Check In (e.g. urgent issues, work-life balance, personal issues):
Goal Discussion:
Action Items:

Next meeting date: \_\_\_\_\_

# Phases of the Mentoring Relationship

## **Initiation phase (6-12 months)**

- Mentor is admired and respected for competence and ability to provide support and guidance
- Mentee represents someone with potential, can provide technical assistance and can transmit mentors values

## **Cultivation phase (2-5 yrs)**

- Positive expectations are tested against reality
- Career functions emerge first; psychosocial functions emerge as the interpersonal bond strengthens

## **Separation phase**

- Relationship is less central part of each individual's life at work; feelings of loss, anxiety
- Structural and emotional separation
- Provides opportunity for mentee to demonstrate skills and operate independently and for mentor to demonstrate that one has been successful in developing new talent

## **Redefinition phase**

- Relationship becomes, primarily, a friendship
- May have ambivalence, discomfort

(Kram 1983)

# ***Initiation:*** **First Meeting Checklist**

## **Get to Know Each Other**

- Share information about your professional and personal life
- Learn something new about your mentee/mentor

## **Establish Guidelines**

- When and where will we meet?
- How will we schedule meetings?
- How will we communicate between meetings?
- What agenda format will we use?
- Will there be any fixed agenda items to be discussed at every meeting?
- How will we exchange feedback?
- How will we measure success?

## **Partnership Agreement**

- Review partnership agreement, modify if desired, sign and exchange
- Review goals for the mentoring relationship

## **Confirm Next Steps**

- Schedule date, time and place of future meetings



# ***Initiation:*** **Structuring Meeting Time**

Determine how to use your time together. One suggestion is the “**10/20/60 Rule**” that will help you to establish a solid partnership and address mentoring goals and everyday issues. For a meeting of about 1½ hours split the time roughly as follows:

## **First 10 Minutes**

Engage in personal/professional—“check-in”

## **Next 20 Minutes**

Focus on ‘front burner’ issues (upcoming presentation, manuscript revision, etc.)

## **Last 60 Minutes**

Discuss current and long term goals and priorities



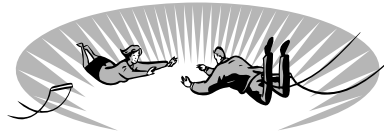
# ***Initiation:*** **Expectations**

A critical component of a successful mentoring relationship is clarity of commitment and expectations.

## **Mentors and mentees need to agree on:**

- Scheduling and logistics of meeting
- Frequency and mode of communicating between meetings
- Responsibility for rescheduling any missed meetings
- Confidentiality
- “Off-limits” conversations
- Giving and receiving feedback
- Working with formalized mentee goals

# ***Cultivating the Relationship: Building Trust***



When people trust each other, they allow their most authentic self to emerge. They feel free to share concerns, insecurities and doubts. Listening to each other builds trust. Sharing reservations and uncertainties builds trust. Most importantly, demonstrating by our acts that we are trustworthy builds trust.

<b>Behaviors That Build Trust</b>	<b>Behaviors That Destroy Trust</b>
Being a proactive listener	Not paying attention to what is being said
Cooperating with others	Being competitive
Openly sharing and being vulnerable	Withholding and keeping people out
Actions are parallel to words	Acting contrary to words
Accepting and non-judgmental	Criticizing and disapproving
Authentic and true-to-self	Acting with a hidden agenda
Freely admitting mistakes and errors	Blaming others for mistakes
Actively seeking out difference perspectives	Keeping a closed mind to new ideas
Encouraging others to succeed	Discouraging others from taking risks
Having a positive, upbeat outlook	Projecting a negative perspective
Honoring and respecting confidentiality	Breaking confidence

# ***Cultivating the Relationship:*** **Giving (and Receiving) Feedback**



Mentees want to receive honest, candid feedback from their mentor. Equally important is the feedback mentees can offer to mentors. Engaging in reciprocal and on-going feedback is a vital component of the partnership.

## **Effective feedback:**

- Is offered in a timely manner
- Focuses on specific behaviors
- Acknowledges outside factors that may contribute
- Emphasizes actions, solutions or strategies

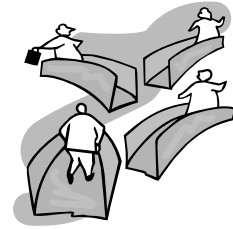
## **Effective Feedback from Mentee:**

- Whether the advice or guidance you offered was beneficial and solved an issue
- Whether the mentor communication style and/or actions facilitate a positive mentoring experience
- Whether the mentor communication style and/or actions create challenges to a positive mentoring experience

## **Effective Feedback to Mentee:**

- Mentee strengths and assets
- Areas for growth, development and enhancement
- Harmful behaviors or attitudes
- Observations on how your mentee may be perceived by others

# Separation and Redefinition



Participating in a mentoring program brings the opportunity for planning and implementing closure that is unlike most other types of relationships. Whether you determine to continue meeting on a regular basis or not, it is essential to discuss and plan the process by which your formal partnership will come to a close.

If appropriate, you will want to think about how you would like to transition from a formal to an informal mentoring partnership or to more of a peer relationship. It is recommended to instill some structure to even an informal partnership so as to yield the most benefit from the time you spend together.

## **Closure Checklist:**

- Discuss how to use the remaining time together.
- Make sure an important goal has not been overlooked.
- Plan a formal acknowledgement or celebration of the mentoring relationship.

## **Questions to Discuss:**

- Have the goals been achieved?
- Have the important issues been discussed?
- How should the separation/redefinition be acknowledged?
- What will the agenda be for the last meeting?
- What would be the ideal interaction going forward?

# Being a Pro-Active Mentee

The most successful mentoring partnerships are those in which the mentee takes the initiative and truly drives the partnership. In a mentee-driven partnership, the mentee determines the pace, route and destination. The mentor is then able to offer insights and counsel that is focused on the mentee's objectives.

## **Consider the following questions:**

- Are my objectives clear and well defined?
- Am I comfortable asking for what I want?
- Am I open to hearing new ideas and perspectives?
- Do I allow myself to be open and vulnerable?
- Am I receptive to constructive feedback?
- Am I able to show I value and appreciate feedback?
- Am I willing to change or modify my behaviors?
- Do I consistently follow through on commitments?
- Do I make an effort to instill trust?
- Do I openly show appreciation and gratitude?

## **Mentee Strategies to Achieve Mentoring Objectives**

Whether your objectives focus on broad issues or more specific developmental areas, your mentor's ability to help you attain those objectives will be enhanced when you have clearly defined where you want to go and how you want to get there. It's important to think carefully about your objectives and the challenges to achieving them.

**Use the questions below to appraise your objectives:**

### **Specificity**

- Have you identified a specific objective for the partnership?
- Are your objectives definite and precise?

### **Measurability**

- Are your objectives quantifiable in nature?
- Have you decided how to measure success?

### **Work Plan**

- Do you have an action plan to achieve your objectives?
- Have you considered the outcome of achieving your objectives?

### **Reality Check**

- Are your objectives realistic given the circumstances?
- Have you determined a completion date?
- Is your timeline realistic?
- Will you need additional resources or tools to be successful?

### **The Mentor's Role**

- Will your objectives require your mentor to provide you something other than guidance?
- How can your mentor be most helpful to you?

# Mentee Dos and Don'ts

<b><u>Do</u></b>	<b><u>Don't</u></b>
<ul style="list-style-type: none"><li>• Take initiative</li><li>• Look for opportunities to teach your mentor</li><li>• Be respectful of mentor's time</li><li>• Communicate agenda and goals with mentor prior to meeting</li><li>• Clarify goals and expectations</li><li>• Practice self reflection</li><li>• Support your peers</li><li>• Keep your Resume, IDP, etc. up to date</li><li>• Have multiple mentors</li><li>• Clarify your values</li></ul>	<ul style="list-style-type: none"><li>• Be passive—don't wait for the mentor to initiate interactions</li><li>• Be late, disorganized</li><li>• Stay in the comfort zone</li><li>• Stay in a mentoring relationship when it is no longer helpful</li></ul>



# Choosing a Mentor



## Choose a mentor who has the following qualities:

- Interested in developing your career
- Commitment to mentoring
- Match your emotional needs
  - Do you need more support and praise or more challenge?
- Match with your professional needs
  - Help with writing? Presentation skills?
  - Project interests
- A successful track record
- Good communication skills
- Will provide networking opportunities
- Is institutionally savvy
- Expresses interest in you as a person
- There is potential for reciprocity

# Mentors Role in Mentee Development

## Support

- Listening—actively (empathically)
- Expressing positive expectations

*(Mentors) balance both a present sense of where their students are and a dream of what they can become.*

- Serving as advocate
- Sharing ourselves

## Challenge

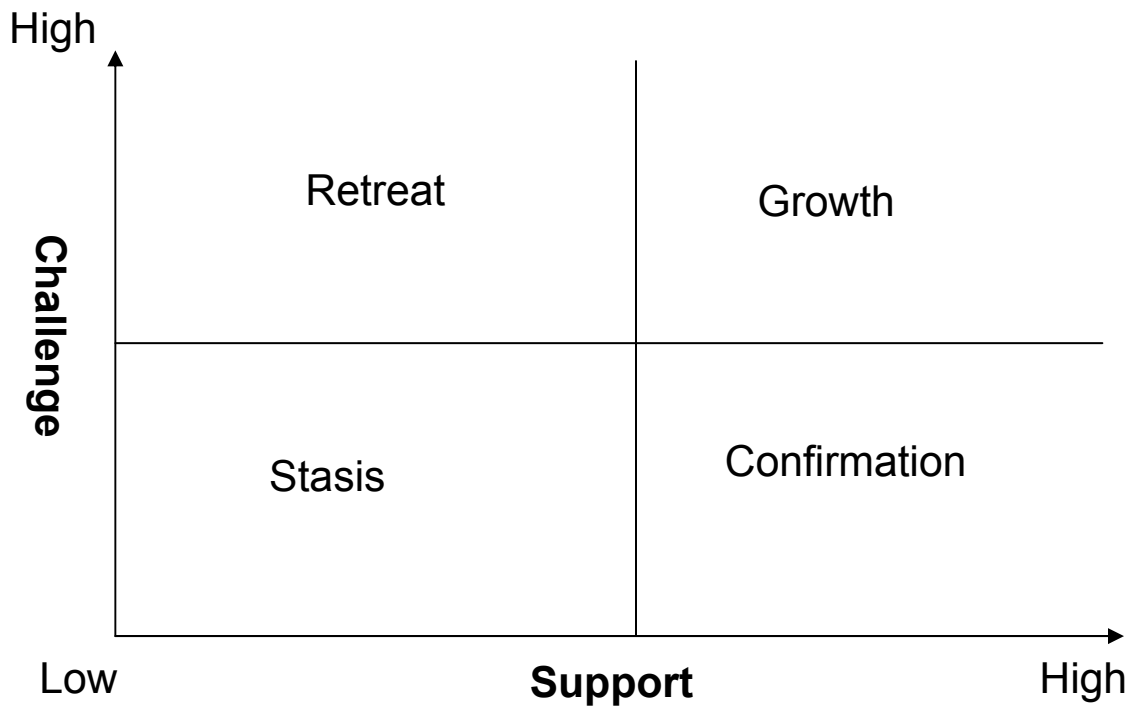
- Setting tasks
- Setting high standards
- Modeling
- Providing a mirror

## Vision

- Provide a vision for a satisfying and successful career

(Daloz 1999)

# Impact of Support and Challenge on Mentee Development



(Daloz 1999)

# Evaluating Your Mentee's Goals



Use the checklist below to appraise your mentee's goals:

## Specificity

- Has your mentee identified specific short and long term goals?
- Are the goals definite and precise?

## Measurability

- Are your mentee's goals quantifiable in nature?
- Has your mentee determined how to measure success?

## Work Plan

- Does your mentee have an action plan to achieve their goals?
- Has your mentee considered the outcome of achieving these goals?

## Reality Check

- Are your mentee's goals realistic given the circumstances?
- Has your mentee determined a completion date?
- Can success be achieved within the time allocated?
- Will additional resources or tools be needed to achieve success?

## Your Role

- Is your role to advise, suggest or listen?
- Will your mentee's goals require you to provide something other than guidance?
- How can you be most helpful to your mentee?

# Mentor Dos and Don'ts

<b><u>Do</u></b>	<b><u>Don't</u></b>
<ul style="list-style-type: none"><li>• Listen actively</li><li>• Support and facilitate networking and brokering</li><li>• Teach by example</li><li>• Be aware of role conflict</li><li>• Encourage and motivate mentee to move beyond their comfort zone</li><li>• Promote independence</li><li>• Promote balance</li><li>• Rejoice in success and convey your joy</li><li>• Encourage reciprocity</li></ul>	<ul style="list-style-type: none"><li>• Fix the problem</li><li>• Take credit</li><li>• Take over</li><li>• Threaten, coerce or use undue influence</li><li>• Lose critical oversight—allow friendship to cloud judgment</li><li>• Condemn (mistakes or lack of agreement are not career altering disasters)</li></ul>



# Mentor's Meeting Checklist

- Set aside adequate time for meetings
- Obtain and review mentee's Resume and IDP prior to meeting
- Be sure to review contact information and other meeting arrangements
- Clarify what mentee expects from you--and what you expect from mentee
- Review mentee's short/long term goals
- Be sure that you have accurate, up to date information on advancement and promotion policies for your mentee
- Ask mentee to help you with writing, presentations, project development etc. that is consistent with their career goals
- Be aware of potential conflicts of interest if you are both a supervisor and mentor for the mentee
- Be sure that mentee has joined committees and professional organizations helpful for career development
- Assist your mentee to find other mentors within and outside Fresno State

# Mentoring Resources

## Partial Listing of Mentoring Programs at Health Sciences Universities:

Baylor College of Medicine  
[http://www.bcm.edu/fac-ed/peer\\_mentoring/index.html](http://www.bcm.edu/fac-ed/peer_mentoring/index.html)

Children's Hospital Boston  
Office of Faculty Development  
[http://www.childrenshospital.org/cfapps/research/data\\_admin/Site2209/Documents/06webjunior%20facultys.doc](http://www.childrenshospital.org/cfapps/research/data_admin/Site2209/Documents/06webjunior%20facultys.doc)

Connecticut Children's Medical Center  
<http://www.ccmckids.org/professionals/development.asp>

Eastern Virginia Medical School  
<http://www.evms.edu/women/wim.html>

Idaho State University  
College of Pharmacy  
<http://pharmacy.isu.edu/live/fs/>

Johns Hopkins School of Public Health  
Center for Mind-Body Research  
[http://www.jhsph.edu/mindbodyresearch/mentoring\\_program/](http://www.jhsph.edu/mindbodyresearch/mentoring_program/)

Massachusetts College of Pharmacy and Health Sciences  
[http://www.mcphs.edu/library\\_resources/subject\\_guides/mentoring.html](http://www.mcphs.edu/library_resources/subject_guides/mentoring.html)

Medical College of Virginia Campus  
Office of Faculty and Instructional Development  
School of Medicine  
<http://www.medschool.vcu.edu/ofid/facdev/facultymentoring.html>

Northeastern Ohio Universities  
College of Medicine and College of Pharmacy  
<http://www.neoucom.edu/audience/faculty/ProfDev/masterteacher>

Penn State University College of Medicine  
<http://www.hmc.psu.edu/opd/faculty/mentoring/index.htm>

Robert Wood Johnson Medical School, University & Dentistry of New Jersey  
[http://rwjms.umdnj.edu/faculty/faculty\\_development/mentoring.htm](http://rwjms.umdnj.edu/faculty/faculty_development/mentoring.htm)

Stanford University  
School of Medicine  
<http://facultymentoring.stanford.edu/guidelines.html>

University of Arizona Tuscon Arizona  
National Center of Excellence in Women's Health  
<http://www.womenshealth.arizona.edu/researchers/mentoring.htm>

University of Arkansas Medical Sciences College of Medicine

## Mentoring Toolkit

<http://www.uams.edu/facultyaffairs/word%20docs/Mentoring%202005.pdf>

University of California, Davis

<http://www.ucdmc.ucdavis.edu/facultydev/mentoring.html>

University of California San Diego

National Center of Leadership in Academic Medicine

<http://nclam.ucsd.edu/>

University of California San Diego Academic Affairs

<http://somapps.med.upenn.edu/fapd/documents/pl00021.pdf>

University of Hawaii

<http://www.fmp.hawaii.edu/>

University of Miami

School of Medicine

Office of Research Education and Training

<http://researchedu.med.miami.edu/x16.xml>

University of Massachusetts Medical School

<http://www.umassmed.edu/facultyadmin/mentoring/>

University of Minnesota

<http://www1.umn.edu/ohr/img/assets/18003/estabneg.pdf>

The University of North Carolina at Chapel Hill, School of Pharmacy

<http://www.pharmacy.unc.edu/labs/mentoring-program/tips-for-mentors-and-mentees>

University of Pennsylvania School of Medicine

<http://somapps.med.upenn.edu/fapd/documents/pl00021.pdf>

Virginia Commonwealth University School of Medicine

<http://www.medschool.vcu.edu/ofid/facdev/facultymentoringguide/index-2.html>

### Miscellaneous Mentoring Resources

A Guide to Training and Mentoring in the Intramural Research Program at NIH

<http://www1.od.nih.gov/oir/sourcebook/ethic-conduct/mentor-guide.htm>

Advisor, Teacher, Role Model, Friend

<http://www.nap.edu/readingroom/books/mentor/#committee>

American Heart Association

Mentoring Handbook

<http://www.americanheart.org/downloadable/heart/1066246125811MentorBook.pdf>

Association for Women in Science

<http://www.awis.org/careers/mentoring.html>

Genentech

<http://www.gene.com/gene/research/fellowship/index>

MedEd Mentoring

<http://www.mededmentoring.org/default.asp>



## Mentoring Toolkit

MentorNet

**<http://www.mentornet.net/>**

Pharmacy Now

MentorVIEW

**<http://www.pharmacynow.org/mentor/default.asp>**

Woman to Woman Mentoring Program

**<http://woman2womanmentoring.com/W2WMentoringProgram.html>**

The American Physiological Society

**<http://www.the-aps.org/careers/careers1/mentor/guide.htm>**

The Mentor Directory

**<http://www.mentors.ca/mentor.html>**

Virtual Mentor, American Medical Association Journal of Ethics

**<http://www.ama-assn.org/ama/pub/category/3040.html>**

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