

*“People are usually more convinced  
by reasons they discover themselves  
than those found by others.”*

Blaise Pascal

## ***‘TOWARD MENTORING EXCELLENCE:***

***A Guide for Mentees to maximize your Mentoring Relationship***

### **O’Brien Institute for Public Health**

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# Course Facilitators

## **MAUREEN MOTTER-HODGSON, B. ED, M.ED., CPCC**

Maureen Motter-Hodgson is an Executive and Organizational Coach who has been engaged in leadership development coaching since 2000. She brings over twenty-five years' experience of working in organizations as a leader and consultant to her coaching practice and understands the daily challenges faced by leaders and their teams. Maureen's belief that coaching is the 'missing link' in learning transfer fuels her energy and enthusiasm for this work.

As a Facilitator, she specializes in the design and delivery of programs to help individuals and organizations achieve more sustainable results. In her coaching practice, she supports leaders and their management teams as they engage in those oftentimes challenging conversations required to work more effectively together. Maureen's signature strengths as a coach are her directness, compassion and insight, and her clients appreciate her ability to challenge and support them as they enhance their leadership presence.

She designs customized training programs for organizations in such areas as Coaching and Mentoring Skills for Leaders, Navigating Conflict and Difficult Conversations in the Workplace, Leading with Confidence and Courage and Enhancing Team Effectiveness.

Maureen has a Master's Degree in Adult and Community Education and Coaching Certification through the Coaches Training Institute. She is a graduate of ORSC (Organization and Relationship Systems Coaching) Program, and is certified in the Myers-Briggs Type Indicator. She is a Past President of ICF Calgary, a charter chapter of the International Coach Federation and is active in the coaching community here in Calgary.

## **CAROLYN POOLE, B.SC., PCC, CPCC, CCMC**

Carolyn Poole is a professional Executive and Career Coach who has been coaching privately and in organizations since 2003. Augmenting her coaching experience, Carolyn has 20 years of experience developing customized workplace learning programs focusing on leadership development and personal effectiveness. Having held leadership roles in both large and small organizations, Carolyn knows first-hand the challenges and the joys of managing and developing people and of leading teams.

Carolyn's coaching credentials include; PCC (Professional Certified Coach) through the International Coach Federation, CPCC (Certified Co-Active Coach), and CCMC (Certified Career Management Coach). She is also certified in the Myers Briggs Type Indicator, the Winslow Profiles and Reports system and a variety of 360 feedback assessments.

In addition to her private coaching practice, Carolyn is also the Lead Coach for the Centre for Creative Leadership (CCL) Calgary coaching faculty. In this role she coaches executives on working strategically to deliver consistently outstanding results and facilitates small groups helping leaders enhance their ability to resolve conflicts and coach their staff.

Clients call Carolyn a trusted coach/partner who helps them identify and leverage their strengths, illuminate and overcome their blind spots, build confidence, and raise the bar on performance. Here's what one client had to say, "*You kick butt as a coach, with your unique blend of warmth, compassion, and gentle toughness.*" Clients describe working with Carolyn as a collaborative, dynamic and transformational experience.

# Learning Outcomes

## **AS A LEARNER, YOU WILL:**

- Be introduced to a Mentoring Model and mentoring definition
- Learn how to co-design an effective mentoring relationship
- Be introduced to the OIPH Mentorship Agreement Template
- Have the opportunity to reflect and prepare for the first meeting
- Discover tools and structures to use to stay on track

# Foundations of Mentoring Using a Coach-like Approach



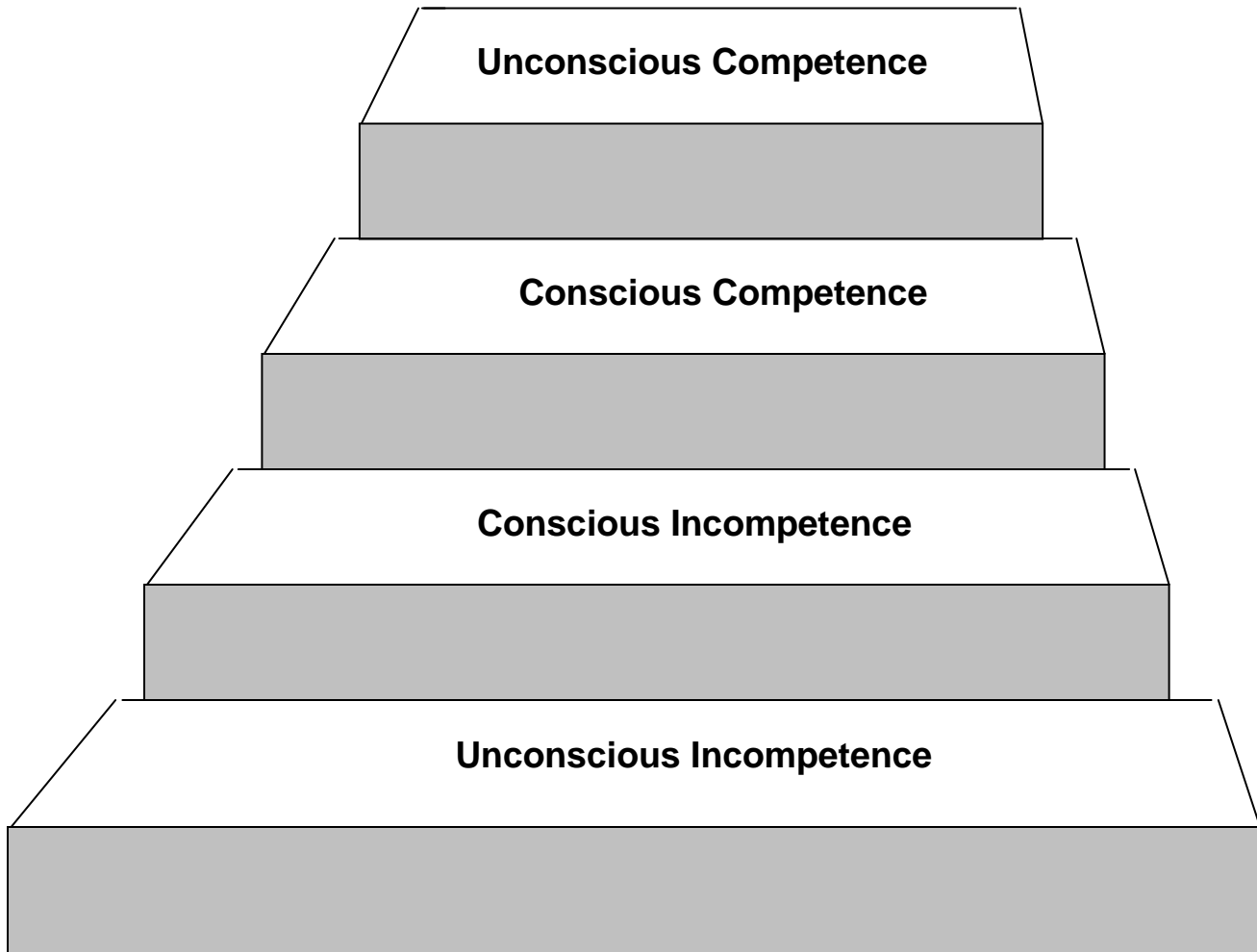
# Mentoring Definition

**“Mentoring is a process for the informal transmission of knowledge, social capital, and the psychosocial support perceived by the recipient as relevant to work, career, or professional development.**

**Mentoring entails informal communication, usually face-to-face and during a sustained period of time between two persons, one who is perceived to have greater relevant knowledge, wisdom or experience, and one who is perceived to have less.”**

- One of the most effective methods for passing on skills, knowledge and wisdom
- It is a reciprocal learning relationship
- Involves skillful coaching
- A method for understanding the culture, organizational values and strategic direction
- Increases self-awareness for the mentor and mentee
- Builds leadership capacity

# Learning Steps



# Great Mentee Reflection...

**Desired Attributes**

**Desired Behaviours**

## **DESIGNING THE MENTORING RELATIONSHIP**

The first meeting is an opportunity for both parties to meet each other, get to know one another's backgrounds and experiences and see if there is a fit. It sets the stage for building trust and rapport, elements that are essential to the relationships growth and success.

The following steps are critical to the success of any formal mentoring relationship.

### **Step 1: Clear Expectations:**

- What is the main purpose of this relationship?
- What are the specific goals each partner would like to address? Goals need to be specific, attainable (with a stretch) and measurable. If the mentor is not able to assist the protégé in attaining these goals another mentor may be a better fit.
- Discuss what each partner wants to get from the relationship.
- Determine the time commitment each partner is prepared to commit to the relationship.

### **Step 2: Scope of Responsibility**

- Determine the scope of responsibility each partner will assume.

### **Step 3: Set boundaries**

- What topics or issues, if any, are outside the scope of this relationship?
- Confidentiality is key to a successful mentoring relationship. What are the parameters around confidentiality?
- What other ground rules do you want to set? (ex: telling the 'hard truth', no judgment, etc.)

### **Step 4: Logistics**

- How often will you meet?
- How, when and where will you meet?
- What sort of communication will take place between meetings?
- Discuss how you will deal with confidential information.

### **Step 5: The Mentorship Agreement Template**

- Document what you have agreed to.



# Designing the Mentoring Relationship cont'd

## **Step 6: Accountability and Commitment**

- What is each partner committed to?
- How will you hold each other accountable?
- Set regular times to review the progress of the relationship. You may want to use the *Mentoring Feedback Form* periodically.

## **Step 7: Obstacles or Disagreements**

- What process will you use to deal with obstacles or disagreements?

## **Step 8: Duration**

- What is the duration of the relationship?
- How will you end it?

## **Step 9: Assessment**

- An opportunity to reflect on the successes and learnings of the relationship
- An opportunity to review what worked, what would have worked better.
- What are the next steps?

# OIPH Mentorship Agreement Template



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## Mentorship Agreement Template

<b>Date:</b>	
<b>Mentor:</b>	<b>Mentee:</b>
<b>Position:</b>	<b>Position:</b>
<b>Main Dept./Faculty:</b>	<b>Main Dept./Faculty:</b>

We are both voluntarily entering into this mentoring partnership as part of the O'Brien Institute mentorship program. We have both read the Mentorship Program Guiding Principles and other provided resources. We understand that mentoring relationships can be short or long term. We have a good understanding of the strengths and limitations of any mentoring relationship. We agree/recognize that:

1. We will meet at least \_\_\_\_\_ per \_\_\_\_\_ for \_\_\_\_\_ (amount of time). Meeting times, once agreed, should not be cancelled unless this is unavoidable (give at least \_\_\_ hours notices). At the end of each meeting we will agree on a date for the next meeting.
2. We will come to our meetings prepared. At the conclusion of each meeting we will agree on goals to accomplish prior to the next meeting and advise one another, well in advance of the next meeting, if we are unable to complete our tasks.
3. In between meetings we will/will not limit our contact with each other by telephone/email no more than \_\_\_\_\_
4. The aim of the Mentoring partnership is to discuss/achieve the following activities/goals (or attached list as appropriate):
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
5. The role of the mentor is to:
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_
6. The role of the mentee is to:
  - a. \_\_\_\_\_
  - b. \_\_\_\_\_
  - c. \_\_\_\_\_

7. We are two different people, with different values. We can learn from each other if we respect and value each other and the ways we are alike and different.
8. We agree to keep the content of these meetings confidential.
9. The mentor agrees to be honest and provide constructive feedback to the mentee. The mentee agrees to be open to the feedback.
10. We will review our progress after \_\_\_\_\_ (number of meetings /date). In the event that our personal or employment circumstances change, or we find that we are unable to develop a mutually beneficial mentoring relationship, we will revisit this agreement and either revise or discontinue by amicable agreement.

\_\_\_\_\_

Mentor's Signature

\_\_\_\_\_

Mentee's Signature

\_\_\_\_\_

Date

\_\_\_\_\_

Date

Adapted from Source: <http://www.queensu.ca/hmrc-create/mentoringguide/orientation/agreement.html> and Kairos Coaching Ltd & Poole Consulting Inc. "Mentoring skills".

# SMART Goals with Possible Action Steps/Behaviours

**S**pecific

**M**easurable/Meaningful

**A**ction Oriented

**R**ealistic

**T**imely

**Goal:**

**Possible Action Steps:**

# Acknowledgment

Knowing how to acknowledge someone is a very powerful skill. It recognizes them for who they are or are becoming, not just for the actions they have taken. When you show sincere interest in, and respect for, who the other person is 'being', and for what they have done or said, you validate their experience, even though you may not fully agree with it. They are not only seen, they are heard.

You need to look beyond what they are actually doing or saying. Search for their core values. What value(s) are they honoring? You need to be able to see the self they had to be in order for them to have done or said what they did. It is about who they are 'being' connected with their inner essence.

There are two very important aspects of acknowledgment:

- articulating or providing the acknowledgment
- noticing the impact of the acknowledgment

Acknowledging someone is very powerful, as people step out of their comfort zones and try on new behaviors. Recognizing the effort and courage this takes is key.

It is important to be aware of your own intentions in providing the acknowledgment. When the acknowledgment taps into the other person's values and experience accurately, the impact can be significant. The other person's response to the acknowledgment shows if you have touched the right chord.

Examples:

**Your ability to support, encourage and give positive feedback mean more than you know.**

**Your willingness to hold me accountable is helping me be more successful.**

**Your commitment to excellence inspires me to do my best work.**

**Your sense of humour helps me keep a sense of perspective around this.**

# Ways to Get Ten Times the Value from Your Mentoring Sessions

## **Create the Mentoring Experience**

Think carefully about what you want to cover before the session begins. Most mentoring sessions are brief; 30 - 60 minutes - so make every minute count. Ask yourself the question, "If I could cover just one critical thing today that would be really valuable and help me get better results what would it be?"

## **Start with a Full Plate**

Working off the question above, make a list; not of one thing, but of 3 - 5 things that would be valuable. Have more on your plate than you think you can possibly go over. You just might be surprised! Of course, you don't want to rush past something important. Some matters take time; you may only cover 1 - 2 items - just make sure they are the important ones.

## **First Things First**

One way to see to it that you get the most value from your session is to prioritize what you want to discuss. Mentoring sessions are not a time to save the best for last! Put the most important item at the top of your list. That way, even if that's the only item that gets addressed, the session will have been worthwhile.

## **Make Clear Requests**

Once you have your prioritized list of topics, write down your specific request for mentoring in one or two short, clear statements. For example, "I want to brainstorm some new ideas", or "I want to further develop some ideas I have by talking them through", or "I want to come away from the session with some resource information" etc.

## **Prepare Your State of Mind**

Take a few extra minutes before the session to mentally prepare yourself, rather than "jamming" the appointment into an already full day. In the words of one protégé: "When I book a session with my mentor, I write down the time of the meeting in my calendar, then I book an additional 15 – 30 minutes for prep time. This way I know that I will be ready to reap the benefits. I may take a short walk and think, I may look over my notes from our last session or review my commitments and progress or think about what feels most important to discuss today. I make sure that I take the time to "shift gears" from my usually busy day. It pays off in big dividends."

## **Minimize the Chat**

Keep small talk to a minimum. While you want to enjoy a good relationship with your mentor, the real reason you are getting together is to reap the benefits of this unique relationship. So make sure that small talk doesn't take up half of your valuable time together. Get down to business with your mentor; that's why both of you are there.

## ...Ten Times the Value – cont'd

### **Be 100% Responsible**

Take full responsibility for the mentoring. Don't expect your mentor to "do mentoring" on you. A healthy approach to mentoring is to consider yourself 100% responsible for how the relationship goes and what value you get out of each session. This is not to say that you keep working with a mentor if the relationship doesn't work for you. Taking 100% responsibility might include completing with your mentor and finding another, or taking a break from mentoring.

### **Train Your Mentor**

Give regular feedback to your mentor so they know what works and what is most valuable to you so they can do MORE of it. You can also help in this regard by making clear requests around what would be most useful at the outset of each meeting. At first, you might not know what's of most value but it won't take long before you realize that some sessions are very powerful and other meetings are so-so. Evaluate what was different about the two sessions and help train your mentor.

### **Debrief**

Take a moment after the session to make a note about discoveries, insights, or themes that were explored during the meeting. Write down action items if you did not write them down during the session. Also capture any topics that didn't get covered in the meeting so that you can address them in the next session if still relevant.

# Mentoring Session Prep Form

**Mentoring Date:** \_\_\_\_\_ **Next Mentoring Date:** \_\_\_\_\_

What I have accomplished since our last mentoring session:

What I wanted to get done, but didn't:

The challenges/problems I am facing now:

The opportunities which are available to me right now:

I want to use my mentor during the session to:

What I am committed to do by the next mentoring session:



# Sample Feedback Form For Mentoring Partners

Mentoring relationships develop and grow over time. This tool may assist you in continuously improving the quality of your learning and mentoring experience.

**Instructions:** Complete this feedback form periodically – every couple of months.

## RELATIONSHIP

1. What is working well?
2. What is our biggest challenge?
3. Some actions that could improve our relationship are.....
4. Next steps?

# Completion of a Mentoring Relationship

What I learned about myself was:

What I learned about my mentoring partner was:

Personal insights and learnings:

What will I do differently as a result of this experience?

On a scale of 1-5, with 5 being highest, how would I rank this experience?