

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

Blaise Pascal

'TOWARD MENTORING EXCELLENCE'

MODULE 1

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 knows the daily challenges faced by leaders and their teams. Maureen's belief that coaching is the 'missing link' in learning transfer has helped fuel her energy and enthusiasm for her 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 build their leadership capabilities and have the necessary conversations to work more effectively together. Her 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 and develop their potential.

Maureen facilitates numerous programs for corporations, as well as teaching in the University of Calgary Business Seminars Series. She provides customized training programs for organizations in the following areas: 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, Coaching Certification through the Coaches Training Institute and has completed the Graduate Coaching program through the Newfield Institute. She is a graduate of the ORSC program – the Organization and Relationship Systems Coaching Program, and is certified in the Myers-Briggs Type Indicator – Steps I and II. Maureen 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 for use in your work
- Hear some OIPH mentoring success stories
- Discuss the characteristics of a great mentor
- Learn how to co-design an effective mentoring relationship
- Be introduced to the OIPH Mentorship Agreement Template to set you and your mentee up for success

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 a person who is perceived to have greater relevant knowledge, wisdom or experience and a person 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

Benefits of Mentoring

BENEFITS FOR MENTORS

- Greater self-awareness
- Enhanced leadership capacity
- Opportunity to set clear expectations, accountability and commitment
- Connection with current issues, values and expectations of younger generations as well as new skills and techniques
- Collaboration amongst divisions
- Ability to pass on knowledge and wisdom gained over the years
- Enhanced self confidence

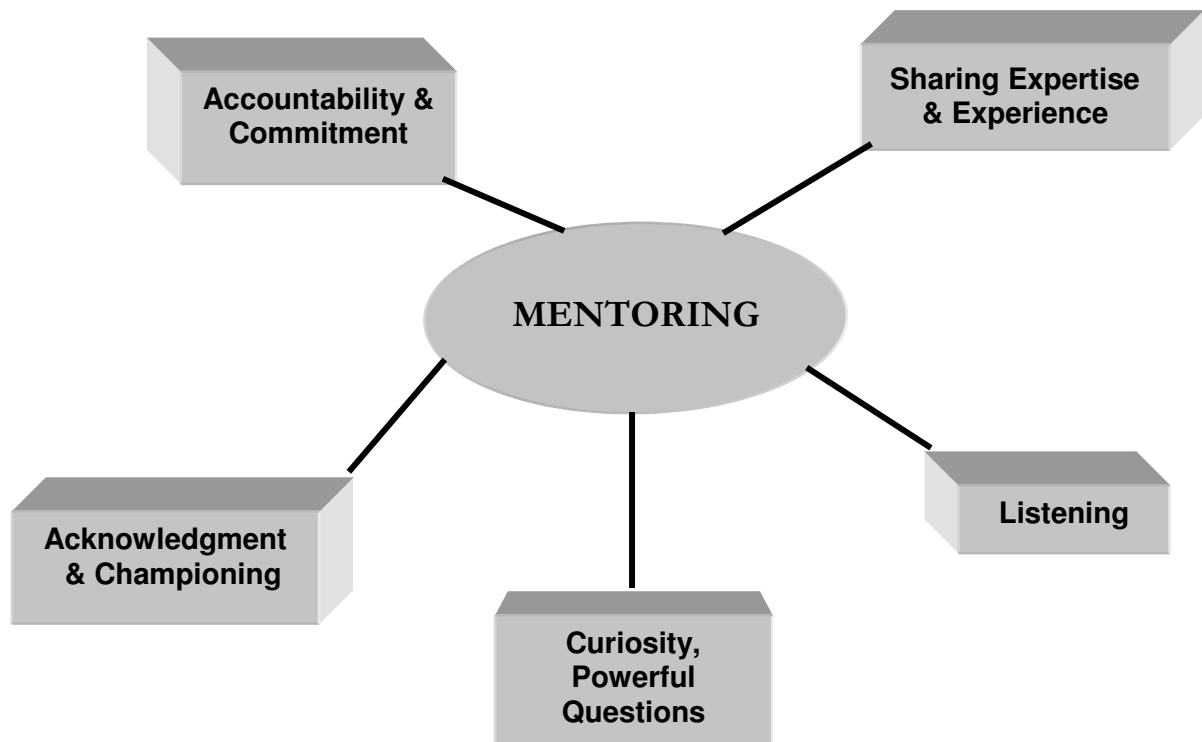
BENEFITS FOR MENTEES

- Understanding of the culture, organizational values and strategic direction
- Increased self-awareness
- Clear expectations, accountability and commitment
- May gain valuable technical and non-technical knowledge
- Develops their own mentoring skills
- Provides a safe sounding board
- Enhanced performance levels
- Promotes career development

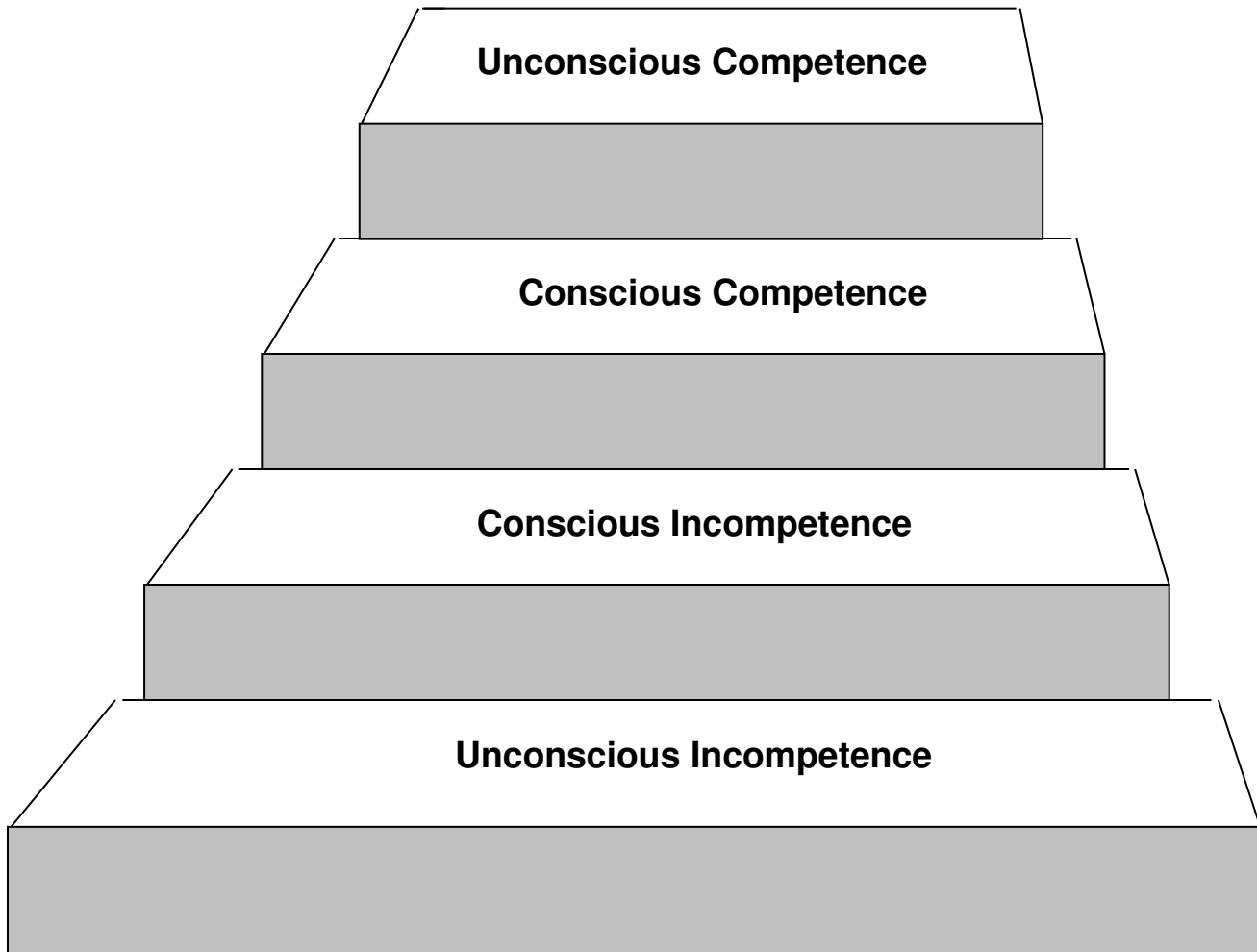
VALUE PROPOSITION FOR THE ORGANIZATION

- Accelerates orientation of new staff
- Higher morale
- Better communication at all levels
- Builds cross functional and more effective relationships
- Shift to a mentoring / learning culture
- Engenders trust
- Assists with talent attraction and retention
- Assists with implementing succession plans
- Accelerates development of high potentials
- Enhances organization's reputation

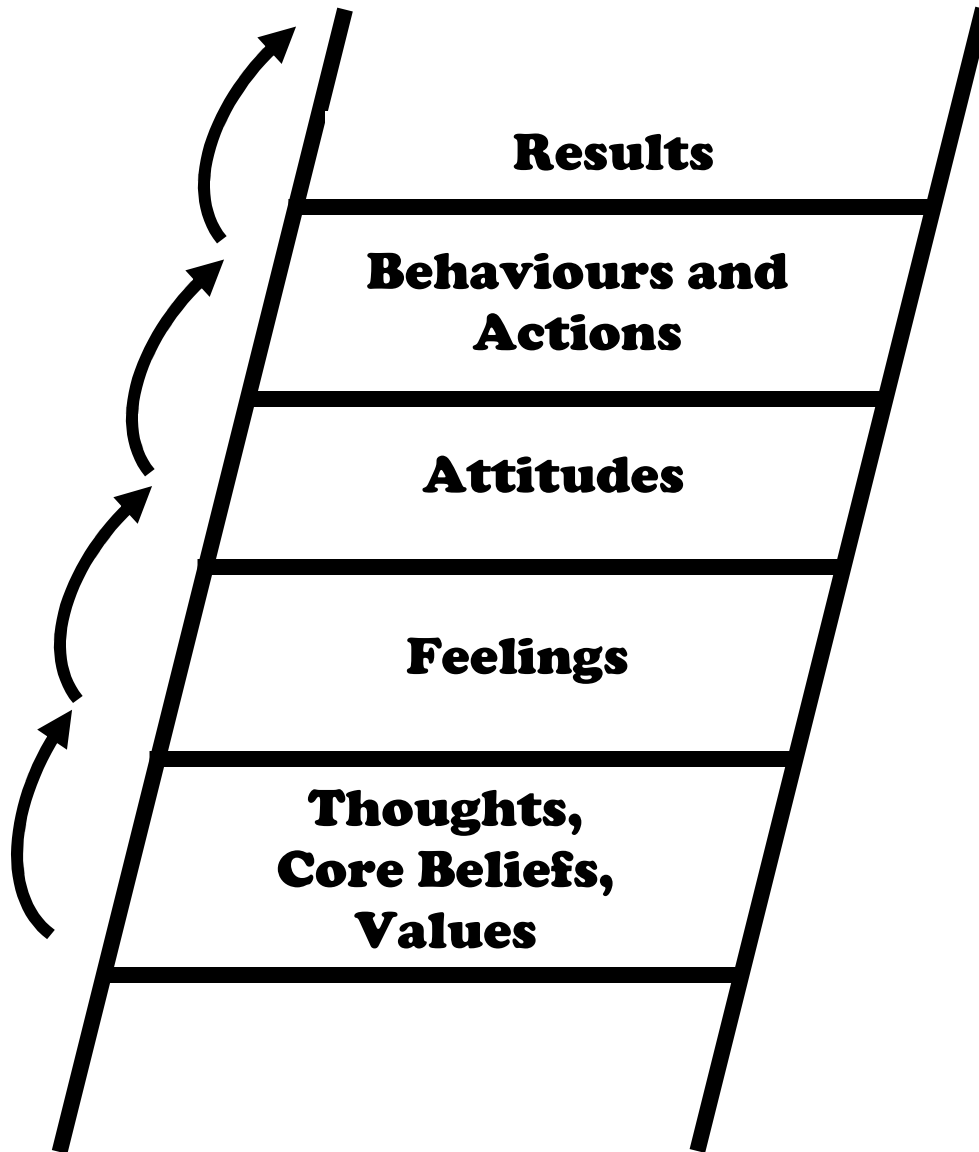
Foundations of Mentoring Using a Coach-like Approach



Learning Steps



The Ladder of Results



Adapted from the work of Alexander Caillet, *The Thinking Path*; 2002

Mentoring Reflection Exercise

Think about a time when you were mentored:

What made this experience so memorable?

What did the mentor do that resonated with you?

What attributes and behaviours were they demonstrating?

What aspects do you want to incorporate into your 'signature mentoring style'?

Attributes and Requirements of a Mentor

- Willingness to commit the time and effort to participate and share their experiences
- Confidentiality
- Mentor's leader understands and is supportive of the time commitments required
- Desire and commitment to assist others
- Accessible and approachable
- Assists in delivering messages about the organization, its values and strategic direction
- Believes in fostering collaborative relationships
- Receptive to other perspectives and open to change
- Willingness and interested in learning from their mentor, the relationship and the experience
- Strong interpersonal and communication skills
- Shows respect for the individual - sensitive to cultural, gender, intergenerational and learning style differences
- Designs an agreement with the mentee to include:
 - Clear expectations for both parties
 - Commitment to discuss any difficulties as they arise
 - Constructive and positive feedback
 - Assisting the mentee in developing their own vision of the future and setting realistic goals and strategies to achieve same
 - Ending the relationship if it is not meeting expectations
 - A review process to assess the success of the relationship

It is recommended that both mentors and mentees receive appropriate mentoring skills training.

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

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



UNIVERSITY OF CALGARY
O'Brien Institute for Public Health

Mentorship Agreement Template

Date:	
Mentor:	Mentee:
Position:	Position:
Main Dept./Faculty:	Main Dept./Faculty:

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".

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?

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 mentee: "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."

.....Ten Times the Value – cont'd

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.

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: