

EXERCISE 2.5

Your Self-Awareness Reflection

My underlying biases and stereotypes:

My discomforts, disconnects, or feelings that might get in the way of mentoring relationships:

Discomforts

Disconnects

Feelings

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EXERCISE 3.3

Mentor Selection Worksheet

Instructions: Mentees can use this worksheet to help determine which potential mentor best meets learning needs and mentoring partnership criteria. The worksheet can also be adapted for use by individuals who are tasked with making mentoring matches.

1. What are you seeking to learn, and why is it important for you?

What?

Why?

2. List your criteria.

What is important to you in a *relationship*?

What might be important to you in a *mentoring relationship*?

What kind of mentor do you think you need?

3. Using your answers to question two, identify your top four criteria; record one in each cell at the top of a column. Then list potential mentors to see if they meet your criteria.

Write criteria here:	Criterion 1	Criterion 2	Criterion 3	Criterion 4
Potential mentor 1 Name:				
Potential mentor 2 Name:				
Potential mentor 3 Name:				
Potential mentor 4 Name:				
Potential mentor 5 Name:				

TABLE 4.1
Getting Ready: Initial Conversation

Agenda	Strategies for Conversation	Questions to Ponder
1. Take time to get to know each other.	Obtain a copy of your mentee's bio in advance of the conversation. If one is not available, create one through conversation.	What kind of information might you exchange to get to know each other better? What points of connection have you discovered in your conversation? What else do you want to learn about each other?
2. Share mentoring stories.	Share your previous mentoring experiences with your mentoring partner.	What did you like about your experiences? What did you learn from those experiences? What would you like to carry forward into this relationship?
3. Talk to your mentee about his or her learning and development goals.	Ask your mentee to describe his or her career vision, hopes, and dreams, and articulate broad learning goals and the reasons they are important.	Why does your mentee want to engage in this relationship? What does he hope to learn? Do his learning goals align with his vision of the future?
4. Determine his or her relationship needs and expectations.	Ask your mentoring partner what he or she wants, needs, and expects out of the relationship.	Are you clear about each other's wants, needs, and expectations for this mentoring relationship?
5. Candidly share your personal assumptions and limitations.	Talk about the mentoring assumptions and limitations you each bring to the relationship. Discuss implications for your relationship.	What assumptions do you hold about each other and your relationship? What are you each willing and capable of contributing to the relationship? What limitations do you each bring to the relationship?
6. Discuss personal and learning styles.	Talk about your personal styles. You may have data from instruments such as the Learning Style Inventory, Myers-Briggs Type Indicator, Emotional-Social Intelligence, and DiSC	How might each other's styles affect the learning that goes on in the mentoring relationship?

Source: Zachary with Fischler (2009).

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EXERCISE 5.4

Mentoring Work Plan

Learning Goal(s)		Success Criteria	
Objectives	Learning Tasks and Processes	Resources	Target Date

EXERCISE 6.3

Goal Audit Checklist

Instructions: Review the draft goal statement (prepared in Exercise 6.2) and record your responses in the spaces below.

SMART Goal Component	Yes	No	What Needs to Be Changed, Added, or Deleted?
<p><i>Specific:</i></p> <ol style="list-style-type: none"> 1. Is what we want to accomplish clear? 2. Are our goals specific and concrete? 			
<p><i>Measurable:</i></p> <ol style="list-style-type: none"> 1. Can the goals we have identified be measured? 2. Will we be able to measure our success? 			
<p><i>Action-oriented:</i></p> <ol style="list-style-type: none"> 1. Are the goals future-oriented? 2. Are the immediate results we anticipate apparent? 3. Are the long-term results articulated? 			
<p><i>Realistic:</i></p> <ol style="list-style-type: none"> 1. Is what we are attempting to accomplish through mentoring achievable? 2. Can we accomplish our goals ourselves, or will we need to rely on collaborators and other resources? 			
<p><i>Timely:</i></p> <ol style="list-style-type: none"> 1. Is this the right time to get started? 2. Is the time we have allocated for creating this initiative adequate? 			

Source: Zachary (2000). Adapted by permission of John Wiley & Sons, Inc.

Creating a Mentoring Culture by Lois J. Zachary

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EXERCISE 2.2

Intercultural Communication Checklist

1. Prepare

- Research your mentee's culture before you meet.
- Identify your intention. What do you want from this relationship?
- Clarify the goals of the mentoring relationship.

2. Remember

- Use active listening skills to clarify and confirm.
- Show interest, attention, and empathy.
- Respect differences in learning pace, and respect silence.
- Experiment with different approaches, questions, and expressions.
- Suspend your judgment.
- Before concluding on any point, clarify meaning and support connection using descriptor questions (who, what, when, how, how much, how many).
- If you need to think about something that comes up in a session, say so. Engage in appropriate reflection and research, and then get back to the other person.
- Be patient.
- Accept differences.

3. Observe

- Your own assumptions, biases, and stereotypes.
- Consistency and relevance in responses and feedback to make sure that adequate communication is taking place.
- Your own values and the underlying contrasting values that might be operating in the relationship.
- Any discomfort, disconnects, or feelings that might be at play.

4. Show

- Respect.
- Reliability.
- Expertise and knowledge.
- A learner-centered focus.

Source: Sandvik (1996). Adapted with permission.

EXHIBIT 6.2**Sample Feedback Form for Mentoring Partners**

Mentoring relationships develop and grow over time. Partners for the Future provides this form as a tool to help you work at continuously improving the quality of your learning and your mentoring experience.

Instructions: Complete this feedback form after each mentoring session. Then use it as a starting point for the next session. There are two options for using this form:

1. Mentor and mentee complete the form independently at the close of each mentoring session and then discuss their individual responses with each other.
2. Together, mentoring partners discuss each item and complete the form.

Relationship

1. Words or phrases to describe the quality of our mentoring interaction:
2. What went particularly well for us:
3. Our greatest challenge:
4. We need to work at improving:
5. Action strategies to improve the quality of our mentoring interaction:

Meeting

1. Our mentoring session was held on:
2. We worked on these learning objectives:
3. Our progress in achieving these objectives:
4. Conditions that promoted learning:
5. We need to work at improving:
6. Objectives for the next meeting:

Learnings

1. One thing I am learning about myself:
2. One thing I am learning about my mentoring partner:
3. One thing I am learning about our mentoring relationship:
4. Personal insights and learnings:

Source: Partners for the Future Mentoring Program, Greater Phoenix Chamber of Commerce (2000).

EXERCISE 5.2

Checklist for Assumption Testing About Confidentiality

Make copies of this checklist before you complete it: one for you to complete and the other for your mentee to complete. With your mentee, look at the assumptions and decide whether either of you holds assumptions that should be added. Write these in the bottom box.

Answer each question with a check in the "yes," "no," or "not sure" box. When you have completed the checklist, review and discuss each item with your mentee. Then come to consensus about what confidentiality will mean in the context of your agreement.

Which of the following assumptions about confidentiality do you hold?	Yes	No	Not Sure
What we discuss stays between us for as long as we are engaged in our mentoring relationship.			
We can freely disclose what we talk about in our conversations with other people.			
After our mentoring relationship has ended, it is okay to talk with others about what we discussed or how we related.			
If there is a demonstrated need for someone else to know, we can appropriately disclose our conversations and impressions with that person.			
What we say between us stays here unless you give me specific permission to talk about it with others.			
Some issues will be kept confidential, while others will not.			
It is okay to discuss with others how we relate to one another but not the content of our discussions.			
It is okay to talk about what we talk about as long as it is positive.			
Other assumptions I hold that should be added to this list:			

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EXERCISE 6.5

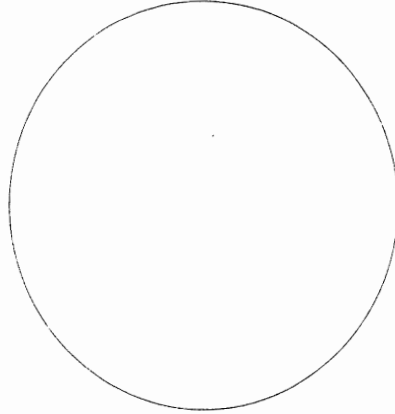
Mentoring Partnership Check-In

Complete this check-in periodically throughout your relationship to make sure your relationship stays on track and the trust level remains high. Discuss your results, and decide what you can do to improve your relationship.

Today's Date:	Never	Sometimes	Most of the Time	Always
We meet regularly.				
We do a good job of communicating schedule changes that may affect mentoring meetings.				
We notify one another if we cannot follow up or honor our commitments to each other.				
We eliminate outside influences and distractions when we meet.				
We check out our assumptions.				
Our communication is clear, and misunderstandings are infrequent.				
We check in with each other to make sure that we stay on track with the learning goals.				
We provide feedback regularly and make sure it is two-way.				
Our meetings are relevant, focused, and meaningful.				
We respectfully acknowledge and address conflict when it occurs.				
We are conscientious about safeguarding confidentiality.				

EXERCISE 6.6**Reflection: How You Use Your Mentoring Time**

Use the circle here to represent the totality of your mentoring relationship time. Divide it into slices based on how much time you spend on various activities and topics.



Check out your perceptions with your mentee's perceptions, and then answer these questions:

1. What does this circle say about the quantity and quality of time you spend in your mentoring relationship?
2. What would you like to do less of?
3. What would you like to do more of?
4. Look at the circle again from the perspective of the percentage of time you spend talking and the amount of time your mentee is speaking. What do you learn from that analysis?
5. Identify three ways you can improve the quality of the time you spend on this mentoring relationship.

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Journaling is particularly helpful for mentors during this phase of the mentoring relationship. It is useful to summarize the session and make notes about insights, and it also helps you remember and stay on track. The track you want to stay on is facilitating learning and, in particular, the functions of support, challenge, and vision. To that end, after each mentoring session, you might reflect on these questions:

1. What did I do to support my mentee's learning?
2. In what ways did I challenge my mentee to learn and to grow?
3. Did I effectively balance support and challenge?
4. How did I assist my mentee in envisioning and moving toward a possible or desired future?

Take care with your answers. This is an opportunity for you to deepen your own mentoring practice.

Journaling for Mentees

You might want to ask your mentee to reflect on these questions. Then you can follow up with a candid discussion.

1. In what ways is my mentor supporting me? What do I need more of? What do I need less of?
2. Is my mentor challenging me appropriately? What do I need more of? What do I need less of?
3. Do I feel that I am making progress in defining and moving toward a future vision? What additional assistance do I need from my mentor?

EXERCISE 8.1

Closure Preparation: Steps and Questions

Follow the steps in column 1 by asking the related questions in column 2.

Closure Preparation Step	Related Questions
1. Revisit your purpose	What was our goal in working together?
2. Envision a best-case scenario for closure.	What would we ideally like to see happen when this mentoring relationship ends? How can we ensure the relationship reaches a positive learning conclusion? If the ideal isn't possible, how can we still ensure a positive learning outcome?
3. Envision a worst-case scenario for closure.	What might get in the way of a positive learning conclusion? What might a positive learning conclusion look like under these circumstances?
4. Plan for mutual accountability.	What will we do to overcome any factors that get in the way of reaching a learning conclusion?
5. Establish a process for acknowledging the time for closure.	How will we know when it is the right time to bring the relationship to closure?
6. Establish ground rules for the learning conclusion conversation.	What will the agenda be for our learning conclusion conversation?

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EXERCISE 5.3

Mentoring Partnership Agreement Template

We have agreed on the following goals and objectives as the focus of this mentoring relationship:

- 1.
- 2.
- 3.

We have discussed the protocols by which we will work together, develop, and, in that same spirit of partnership, collaborate on the development of a work plan. In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. Meet regularly. Our specific schedule of contact and meetings, including additional meetings, is as follows:
2. Look for multiple opportunities and experiences to enhance the mentee's learning. We have identified, and will commit to, the following specific opportunities and venues for learning:
3. Maintain confidentiality of our relationship. Confidentiality for us means:
4. Honor the ground rules we have developed for the relationship. Our ground rules are:
5. Provide regular feedback to each other and evaluate progress. We will accomplish this by:

We agree to meet regularly until we accomplish our predefined goals or for a maximum of [specify time frame]. At the end of this period of time, we will review this agreement, evaluate our progress, and reach a learning conclusion. The relationship will then be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated mutually agreed on goals.

In the event one of us believes it is no longer productive for us to continue or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event, we agree to use closure as a learning opportunity.

Mentor's signature and date _____

Mentee's signature and date _____