Introduction

This guide is intended as a practical toolkit for creating and sustaining positive, productive mentoring experiences. Embracing both flexibility and possibility, this guide is technology-neutral and untethered to any formal mentoring program, instead encouraging mentor-mentee pairs to personalize their own mentoring experience as circumstances and preferences require. This guide is broken down into four linear phases—Planning, Connecting, Advancing, and Transitioning—with each phase including its own list of tasks and responsibilities both mentor and mentee should undertake.

Emerging Leaders Class of 2015

Group C

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The **Planning** phase is an important first-step in cultivating a successful, rewarding mentoring experience. The mentor and the mentee must critically consider their reasons for choosing mentorship, their goals for the mentoring experience, and their overall career goals. As always, documenting these considerations is encouraged.

**Mentor**

- Reflect on why you want to be a mentor and what you are hoping to learn or achieve as a result of the mentoring experience. What are your goals?
- Reflect on your personal and professional experiences and consider how they will influence the mentoring relationship.
- Consider how much time you can devote to a mentoring relationship.
- Consider doing and sharing assessments that might be useful.
- Share your resume/curriculum vitae with your mentee.
- Write down any questions you may have for your mentee.

**Mentee**

- Determine if this is a good time for you to enter a mentoring relationship. Do you have the time to commit to this relationship?
- Identify a few short and long term goals and ideals for discussion at the first few mentoring sessions.
- Determine if this person is an appropriate mentor for you. Consider if they are in the same field or organization and whether this is an appropriate time in their career to take on a mentor.
- Have you done any strengths-finding assessments? Consider sharing them with your mentor.
- Establish what and how you can learn from your mentor.
During the **Connecting** phase, the mentor and the mentee construct a framework for their relationship. The pair should agree upon basic logistics regarding time commitments (including full duration of mentorship—between six months and two years is recommended), preferred communication tools, and relationship goals, as well as establish mutual trust and camaraderie.

**Mentor:**

- Have a written agreement. State the obvious.
- Take time to get to know each other.
- Discuss expectations including confidentiality, honesty, conflict of role issues and individual boundaries, time commitment, and preferred communication method.
- Review the mentee's goals and share your goals for the relationship
- Listen actively and be supportive, helpful, friendly and interested in the mentee and their aspirations.
- Plan for closure at the beginning: How long will this relationship last. Set time period or until certain goals are met?

**Mentee:**

- Be committed to the relationship: follow through, ask questions if you need to, and have a timeline of goals decided from the start for which you are accountable.
- Have an agreement for the length of the relationship and set milestones together. Make a schedule.
- Be open to criticism: be ready for your mentor to challenge and guide you.
- Have a discussion of appropriate boundaries and guidelines for the relationship.
- Seek feedback from yourself and from your mentor: ask questions, remember to ask yourself if the relationship feels appropriate and helpful.
The Advancing phase of the mentoring experience is where the majority of the pairs' time and energy will be spent. While maintaining an open, convivial atmosphere, rooted in trust established during the Connecting phase, the mentor should constructively challenge the mentee to think and learn more deeply.

**Mentor:**

- Moving from friendly banter to strategic meetings. Target sections to discuss.
- Networking: introduce mentee to colleagues who may help the mentee accomplish goals.
- Identify Opportunities: Help mentee identify development opportunities, including professional development.
- Hold Accountable for Actions: Help mentee identify actions they will undertake at the end of each mentoring session and follow up with the mentee on their progress at the beginning of the next session.
- Note taking: Take notes, reflect on what is working, what is not working, which goals have been meet, and which goals are continuing.
- Questions for reflection: “use questions that facilitate reflection” Ask deeper questions of the mentee and probe their thinking to build skills.
- Next steps: Reflect if this is the time to move on to transitioning.

**Mentee:**

- Respond to prompts and questions; be open to growth and challenges.
- Seek help with networking, professional development, key readings, and trends.
- Hold Accountable: have an action plan for next meeting and markers for goal progression. Strive to meet your goals and be aware of time to transition between stages of mentorship.
- Reflect outside of session time, keep notes, and come prepared to discuss things more deeply with your mentor.
The Transitioning phase marks the conclusion of the mentoring experience. During this phase, the traditional roles of mentor and mentee dissolve, and the relationship becomes a professional connection that, if cared for properly, will last indefinitely.

**Mentor:**

- Transition regardless of the circumstances of the relationship’s closure.
- Have a final meeting to reflect on the shared experience.
- Plan for closure at the beginning.
- Review initial Planning phase- for your goals and hopes for the mentoring relationship and reflect on those prior to the final meeting.
- Reflect on your mentee’s development and prepare to share your observations of their growth.
- Reflect on what you have learned from your mentee as a result of mentoring.
- Celebrate the mentee’s successes and the goals you’ve helped them achieved.
- Discuss the future and what the mentee’s next goals might be.

**Mentee:**

- Have a final meeting to discuss what you’ve accomplished.
- Did you meet all of your goals? Did you meet them in a time frame that felt satisfactory?
- Give your mentor feedback, and accept feedback given to you.
- Prior to the final meeting, reflect upon your development over the course of the mentoring relationship and be prepared to share with your mentor the role they have played in your growth over this time.
- Reflect upon what you have learned from your mentor.
- Discuss the future and what role, if any, your mentor might play for you.
- Celebrate your successes!
- Are you ready to become a mentor yourself?