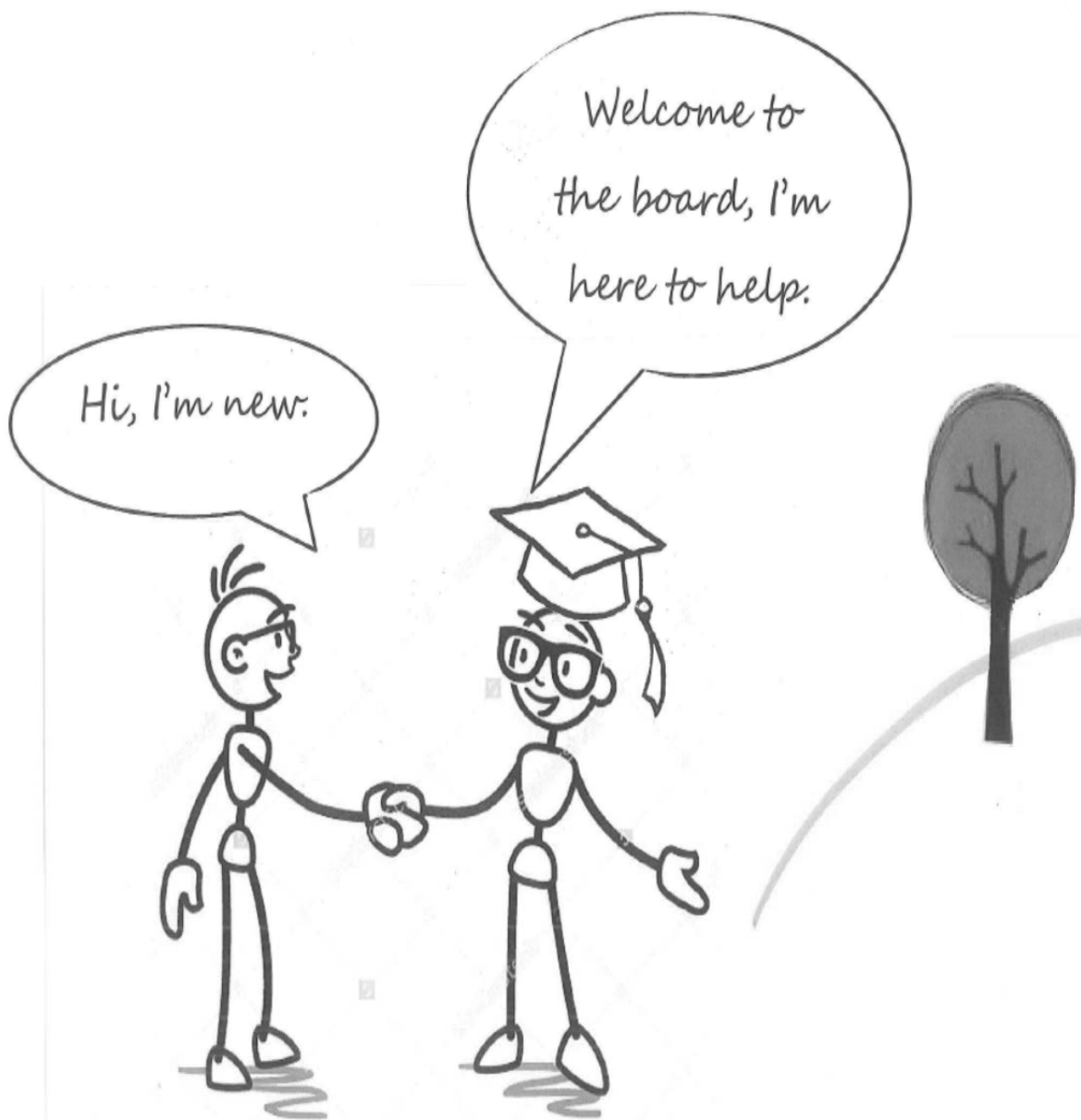


Board mentoring toolkit

A resource for DELWP entities



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Introduction – What is mentoring?

This resource for mentors and mentees focuses on the intangible elements of a mentoring relationship, those factors make up the personal, human pieces of mentoring. This resource will help participants learn about, understand and apply the knowledge in terms of these intangible relational factors.

What is mentoring?

Mentoring is a personal and career enhancement strategy through which one person relationally facilitates the development of another by sharing known resources, expertise, values, skills, perspectives, attitudes and proficiencies. It allows the learner to build skills and knowledge while attaining his/her development goals. Conversely, it provides the opportunity for the experienced party to further enhance his/her skill and knowledge areas by continuously reassessing and building upon those areas.

Who is involved?

Mentoring relationships typically involve two people:

1. A mentee who wishes to develop specific learning areas; and
2. A mentor who fulfills the role of expert for those particular learning areas

Mentoring is a relationship

The mentoring relationship is based on mutuality — both the mentor and mentee collaborate in the mentee's development. Mentoring does not require a high degree of personal connectedness in order to pass on the desired skill, knowledge, attitudes or behaviour. However, there does need to be collaborative negotiation and joint accountability about what is to be learned, how the transfer of learning will take place, and how the learning will be monitored and evaluated. In addition, if both parties are able to express respect to respond freely and honestly about strengths, weaknesses, goals and concerns, the learning will be greatly enhanced.

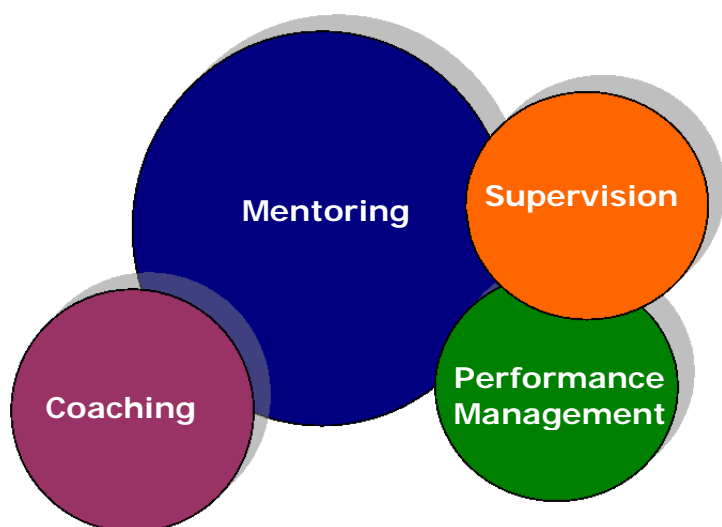
Mentoring involves sharing

While sharing can take place over a short or a long period of time, equal participation in the mentoring relationship is a must. Effective sharing involves freely giving thoughts, opinions, concepts, ideas, experiences, hunches, techniques and learning to one another.

Mentoring involves the development of yourself and others

Development in a mentoring relationship means identifying and encouraging growth. In mentoring relationships it is important to keep the mentee's professional and personal development goals at the center of mentoring activities and conversations. However, two-way development is encouraged through the sharing of resources and time with each other, which benefits both the mentor and mentee.

Mentoring: What it is: What it isn't



Mentoring, because of its holistic nature, touches on several other common management practices, such as coaching, supervision and performance management, yet mentoring remains distinct in purpose and practice.

Mentoring is a mutual process. Geography or organisational silos do not bound mentoring. You can be from different locations and perform different functions within the organisation and still create a successful developmental relationship. Mentoring expands potential through a collaborative developmental process. “Relationship” is the operative concept that will make your mentoring experience unique and powerful.

What are the benefits of mentoring?

Benefits for mentees

- Insight into the pros and cons of various career options and paths
- Increased self-awareness and self-discipline
- An expanded personal network
- Support in the transition to a new role or location
- A sounding board for testing ideas and plans
- Positive and constructive feedback on professional and personal development areas
- Accelerated training and development

Benefits for mentors

- Proven method to share ideas, try new skills and take risks
- Enhanced capacity to translate values and strategies into productive actions
- Extensive information about the larger organisation and the current business issues of other parts of the business
- Identification of opportunities to enhance personal contribution to the future of the company

- Increased awareness of personal biases, assumptions and areas for improvement
- Renewed enthusiasm for their role as expert
- Personal fulfillment from investing in others

Benefits for DELWP entities

- An environment that fosters personal and professional growth through the sharing of business information, skills, attitudes and behaviors
- Increased role modeling of leaders teaching other leaders
- Accelerated processes for the identification, development and retention of talent for leadership and technical jobs
- Increased 'job' satisfaction for mentees and mentors
- Sharing and leveraging strategic knowledge and skill throughout the public sector
- A means for leaders to align with one another on business direction
- Enhanced learning and diversity in the sector.

How do I find a suitable mentor?

A mentor can be anyone who has the knowledge, skill or expertise in one or more areas that another individual would benefit from developing in. A suitable mentor is not always someone older or with longer length of service within the organisation. A mentor can be someone who is a peer, a more senior employee or even a more junior employee.

There are a number of methods you can explore to find a mentor:

Ask a colleague you already know to mentor you or if you don't know someone then:

- Tell people you are looking for a mentor and why – the more people you tell the more likely someone will be able to recommend a suitable mentor
- Talk to your fellow board members– it is possible they will know someone or will be able to help you find someone who has the qualities you are looking for
- Talk to DELWP about potential mentors in the wider DELWP board community.

Checking compatibility with a potential mentor

Once you have found a potential mentor it is a good idea to interview them to check their compatibility. Some suggested areas to ask about include:

- Position
- Location
- Areas of expertise & specific skills
- Job history
- Formal qualifications
- Major accomplishments
- Hobbies and/or outside interests.

Getting started: Establishing the mentoring relationship

What is expected of me as a mentee?

As a mentee, you have many responsibilities in terms of your mentoring relationship, not the least of which is initiating and driving the relationship. Always remember, this is your mentoring relationship focused on your development and learning needs. Therefore, you are in charge of ensuring that the relationship progresses appropriately and meets its ultimate goals.

You must assess your areas of strength and development so you can establish a mentoring plan and grow as a capable and intelligent employee. This plan should include goals you'd like to accomplish through a mentoring relationship, ways you will be held accountable for success or failure to accomplish those goals, and boundaries you want to place on the relationship, such as focusing it only on professional aspects of your life. It is your responsibility to initiate contact with a mentor and ensure the mentor helps you attain your goal

Mentees are:	
Expected to:	Not Expected to:
<ul style="list-style-type: none">▪ Initiate and drive the relationship▪ Identify initial learning goals▪ Seek feedback▪ Take an active role in their own learning▪ Initiate monitoring and closure sessions▪ Allocate time and energy▪ Follow through on commitments or renegotiate appropriately	<ul style="list-style-type: none">▪ Be an expert▪ Know all the questions they should ask▪ Get things right the first time▪ Fit all learning into one mentoring relationship▪ Look to the mentor for all answers about their work▪ Be submissive in their relationship▪ Develop a friendship with the mentor

What is expected of me as a mentor?

As a mentor, it is your responsibility to provide guidance to your mentee based on their learning needs and development areas. You can accomplish this in several ways and through various roles. You could act as a resource, advisor, teacher, coach, model, sponsor, consultant or guide. Yet no matter what role you play, remember that you are responsible for providing guidance to your mentee either through being the expert in the relationship, or if need be, by helping the mentee find access to the appropriate experts.

Mentors Are:	
Expected to:	Not Expected to:
<ul style="list-style-type: none"> ▪ Have reasonable expectations of the mentee ▪ Be a resource ▪ Provide feedback ▪ Allocate time and energy ▪ Help the mentee develop an appropriate learning plan ▪ Follow through on commitments or renegotiate appropriately 	<ul style="list-style-type: none"> ▪ Drive the relationship ▪ Seek out a mentee ▪ Do the work for the mentee ▪ Manage the mentee as a supervisor would ▪ Be an expert in every imaginable development area ▪ Develop a friendship with the mentee

Forming the Mentoring Agreement

The Mentoring Agreement (a copy of which is supplied in the resources section of this toolkit) serves as the backbone for the mentoring relationship. It provides the framework for the scope of the relationship and acts as a contract between mentor and mentee.

The discussion and completion of the Mentoring Agreement during an initial mentoring session ensures clarity and mutual understanding.

Based on the essential elements of a mentoring agreement, consider the following questions when negotiating your final agreement.

- Can the mentor help the mentee meet these goals?
- How will the mentee retain accountability for his/her progress?
- Do these confidentiality standards meet both of parties needs?
- Why are these proposed boundaries important?
- Will this meeting schedule work for both parties?
- How can the progress be monitored?
- Are both parties comfortable with the agreed level of mentoring?

The mentoring agreement will help you stay focused as you handle the intangible qualities of the mentoring relationship.

Agreeing on the duration and frequency of mentoring sessions is an important element of the Mentoring Agreement as it provides both parties with a clear idea of the time commitment which will be required. A designated timeframe also ensures the relationship remains focused and productive.

Goal setting strategies

As part of the mentoring relationship, the mentee should set specific and appropriate goals for performance improvement, achievement and/or learning.

One way to test the goals is to ask whether they are SMART.

S	Specific and stretching? Try to break large, general goals into smaller, more specific ones that are challenging.
M	Measurable? Progress needs to be tracked and evaluated. If the mentee has a performance management plan, consider using the same measures so the mentee can directly demonstrate improvement. Also, quality, cost and time are three basic types of measures.
A	Attainable? Can it be done? Is the mentee aiming for something that is unachievable?
R	Realistic? Are the mentee's goals realistic given their time, resources, priority and motivation?
T	Time-framed? When will the mentee complete the goal? Set intermediate but repeating goals for things you want to become a habit.

Maintaining the relationship: Effective Mentoring

How do we ensure it is successful?

In order to be effective, your mentoring relationship needs to possess:

- **Collaboration** - Both the mentor and mentee play a partnership role in the mentee's development.
- **Respect** - Mutual appreciation is core as both parties are investing time and energy.
- **Responsiveness** - As in any respectful collaboration, the mentor and mentee need to be sensitive and responsive to the goals, needs and perspectives of the other.
- **Confidentiality** - This supports the ability to be vulnerable, yet safe, in difficult conversations.
- **Joint Accountability** - When both parties keep agreements, this strengthens trust and helps keep the learning relationship focused and productive.
- **Free and Honest Expression** – Both parties can share their strengths and weaknesses; dreams and goals; and past, present and anticipated experiences. Both of you can offer and hear feedback in the spirit of building on competencies and strengthening areas of weakness.
- **Focus** - The mentoring relationship needs to be clear in its purpose and goals. The mentoring agreement goals are the focus of learning and development.

Giving and receiving feedback

Feedback is essential ingredient for personal learning and professional development. Without feedback people are left to “fill in the blanks” on their development and performance. When delivered well, feedback enables people to develop their personal effectiveness by learning about their development needs and understanding their strengths.

As a **mentor**, delivering effective feedback remains an essential skill that can help improve the quality of your mentoring relationship. Your mentee will often look to you for feedback on their performance, ideas, development progress, etc. Therefore, it is vital to the success of your relationship that you understand how to give effective feedback. It is also important to keep in mind that your mentee may give you feedback during your mentoring relationship, placing you on the receiving end of feedback—quite a different perspective than that of the one giving feedback. This shift in perspective can help both you and your mentee reassert your commitment to the relationship and show your continued support for your mentor.

As a **mentee**, you will look to your mentor for feedback on your performance, ideas, development progress, etc. Yet you may also give your mentor feedback from time to time. Therefore, it is vital to the success of your relationship that you understand how to give effective feedback. This will in turn help you better understand the process your mentor uses when giving you feedback.

It is recommended that both mentors and mentees make use of the ‘characteristics of effective feedback checklist’ in the resources section of this toolkit to ensure a healthy feedback loop is maintained throughout your mentoring relationship.

Recording & evaluating

It is important to keep notes and a record of your meetings. These recording processes will help keep the mentoring relationship on track, provide an opportunity to reflect on the learnings and evaluate the relationship's progress and ultimate success. A summary record meeting log and worksheets for your initial meeting and subsequent meets are included in the ‘resources’ section at the end of this toolkit.

Remember, the mentoring relationship is based on mutuality and sharing of experiences, thoughts, opinions, ideas and most of all learning from one another.

Appendices

Appendix 1: Characteristics of effective feedback checklist

Appendix 2: The Mentoring Partnership Agreement

Appendix 3: Meeting checklist for mentors

Appendix 4: Mentoring meeting worksheets

Appendix 1: Characteristics of effective feedback checklist

Effective feedback must be carefully given so the message is clear and the purpose is understood. Six characteristics generally represent effective feedback.

1. Defined by a clear purpose

The purpose of effective constructive feedback is to help the receiver improve or take advantage of a developmental opportunity. It is useful to ask these questions to clarify the purpose for giving feedback:

- Why are you giving feedback?
- Why do you want the person to change?
- What message do you want him/her to hear?

2. Specific and descriptive

If feedback is not specific, the receiver is left with useless information they can do nothing about. For example: “You need to change your attitude” is a general statement with an unclear focus. However, “You have been late for the last three meetings” is specific and descriptive. When you describe the behavior or incident that led you to conclude the performance is acceptable or unacceptable, the receiver is more likely to hear what you are saying without getting defensive. To check how specific and descriptive your feedback is, ask yourself these questions:

- If you are giving feedback about a problem
- How do you describe the problem?
- If you want the person to change, how will they know what to change?

3. Relevant

Many times, we find ourselves giving feedback to an individual that is irrelevant to their job or development. Giving feedback does not mean providing the person with all the information available, but providing him/her with relevant information. Ask yourself these questions about the relevance of your feedback:

- How much of the feedback you give really applies directly to the person’s situation?
- What language will you use to reduce defensiveness?

4. Actionable

Feedback should enable the receiver to take action upon it. Feedback that is not actionable can be destructive, leaving the receiver feeling helpless and frustrated. Ask yourself the following:

- Based on your feedback, how will the receiver know what his/her responsibilities are or what action to take?
- What measures can you use to evaluate change?
- How would you respond if someone gave you this feedback?

5. Timely

Feedback should be delivered in a timely manner and in an appropriate environment and situation for feedback delivery. Ask yourself these questions about the timeliness of your feedback:

- When is the best time to give feedback?
- In what environment should feedback be given?

6. Balanced

Feedback should entail listening, as well as speaking, and being open to receiving as well as giving feedback. Effective feedback balances the positive with the developmental, helping to provide a realistic perception. Ask yourself these questions about the balance of your feedback:

- How much opportunity will the receiver have to respond to your feedback?
- Are you open to changing your opinion based on the person’s response to your feedback?

Appendix 2: The Mentoring Partnership Agreement

It is recommended that mentors and mentees work through this document in the initial meeting; it will ensure that crucial elements of an effective mentoring relationship are discussed upon from the very start.

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

1. _____
2. _____
3. _____

In order to ensure that our relationship is a mutually rewarding and satisfying experience for both of us, we agree to:

1. **Meet regularly.**
Meetings will occur every... (E.g. monthly, every two months with additional meetings as required, etc.)

2. **Maintain confidentiality of our relationship.** We agree that confidentiality encompasses:

3. **Provide regular feedback to each other and evaluate progress.**
We agree to accomplish this by:

4. **Explore opportunities and experiences to enhance the mentee's learning.**
We agree to pursue the following specific opportunities for professional development (e.g. shadowing):

We agree to meet regularly for a period of:

- Six months
- Nine months
- One year

At the end of this time, we will review this Agreement, evaluate our progress and reach a learning conclusion. Once we have agreed on this, the relationship will be considered complete.

However, if we choose to continue the mentoring partnership, we may negotiate a basis for continuation, as long as we have stipulated mutually agreed terms and goals.

In the event that one of us believes the relationship is no longer productive 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

Mentee's Signature

Date:_____

Date:_____

Appendix 3: Meeting checklist for mentors

Pre -planning	<ul style="list-style-type: none"><input type="checkbox"/> Do some initial research about the mentee (e.g. speak to their line manager to identify the mentee’s background, current skills and experiences, etc.)<input type="checkbox"/> Prepare or at least consider some structured questions to help gain understanding and to build rapport:<ul style="list-style-type: none">• <i>How long the mentee has been on a board and in what roles?</i>• <i>What made the mentee seek a mentoring arrangement?</i>• <i>What are the mentee’s expectations of you?</i>• <i>Which specific areas the mentee wants support in?</i>• <i>What is the mentee’s preferred learning style?</i>	The following table will aid mentors in preparing for, conducting and evaluating mentoring sessions
Initial session	<ul style="list-style-type: none"><input type="checkbox"/> Treat this session seriously – frequent rescheduling and/ or interruptions will send the message you are not invested in the mentoring relationship<input type="checkbox"/> Aim to create an open, honest, ‘no barriers’ environment conducive to honest discussions<input type="checkbox"/> Work through and complete the Mentoring Partnership Agreement	
Ongoing sessions	<ul style="list-style-type: none"><input type="checkbox"/> Endeavour to keep to the agreed planned sessions<input type="checkbox"/> Be prepared to have occasional ‘impromptu’ sessions to address specific concerns<input type="checkbox"/> Monitor, review and discuss potential actions<input type="checkbox"/> Aim to provide options rather than solutions<input type="checkbox"/> Continually seek and provide feedback – reinforcing that the relationship is based on open and honest communication<input type="checkbox"/> Consider introducing the mentee to professional networks<input type="checkbox"/> Explore career development opportunities and challenges<input type="checkbox"/> Be systematic and always keep objectives in view<input type="checkbox"/> Continually review and evaluate the mentoring arrangement and sessions, making adjustments where necessary	

Appendix 4: Mentoring meeting worksheets

The recorded notes from the initial meeting will be different to subsequent meetings. Suggested worksheets for both are included below.

First Meeting Worksheet

Date: _____

Learning agreement

What are the key areas that you wish to work on in your mentoring program?

Goal statement

Can these areas be transcribed to SMART goals?

Way forward

What are your commitments for the next session?

Have you completed the Mentoring Agreement?

Ongoing Meeting Worksheet

Date: _____

Meeting#: _____

Goal connection

What is your current thinking and feelings in relation to your goals?

Strategy and actions

What resulted from the agreed actions you undertook? What insights have you had?

Way forward

What are your commitments for the next session?

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