

A mentors' guide to getting started

Content of this mentor's kit:

1. Mentoring definition and process (p. 1)
2. The mentors' attitudes and skills (p. 3)
3. The first mentoring meeting (p. 5)
4. A mentoring agreement (p. 6)
5. Effective relationships & overcoming challenges (p. 7)
6. Winding up the mentoring relationship (p. 8)

Appendices:	A1: Phases of Reflective Space / Questions mentors may ask	p. 9
	A2: Roles of a Mentor	p. 12
	A3: Avoiding the Typical Habits of a Toxic Mentor	p. 14
	A4: Template: Mentoring Agreement Checklist	p. 15
	A5: Template: Mentors' checklist for the mentoring meetings	p. 17
	A6: Template: Winding-Up checklist	p. 19

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1. Mentoring definition and process

Definition: [Traditional] mentoring is

- a relationship in which a more experienced/knowledgeable person (mentor) helps to guide and support a less experienced/knowledgeable person (mentee). It is a learning and development partnership between someone with greater experience and someone who wants to learn from them.
- a 1:1 meeting in a “safe-space” between mentor and mentee, typically a 60 - 90 minutes conversation every two to six weeks over several months, one year or even longer. It might be on-site, remotely by Skype, or any other online meeting tool. Other shorter-term mentoring models include those with one or two mentoring meetings, or group mentoring with several mentees.

A **key learning process** in a mentoring relationship is through using Reflective Space (see appendix 1) where the mentor supports the mentee to reflect on an issue they are currently facing. This one to one reflective space is useful for the mentee to take time out from normal working and mind clutter and, through focussing on the issue and reaching a new understanding of it, helping to shed light and develop forward action on the mentees' blind spots. Reflection shared with a mentor needs a trusting and open environment to address the mentee's challenges and weaknesses and to encourage them to step out of their comfort zone, at least in their mind. By being constructively challenged the mentee can step back from routine activity and consider other options and points of views, eventually trying out new ways.

Steps to aid this reflection are:

1. Exploration: By asking questions (see appendix I for examples) the mentor supports the mentee to step back from normal working and explore an issue.
2. New understanding: Through appropriate exploration, new understanding is gained which helps the mentee to change their perspective through reflection of their own perceptions etc. The mentor might also share their own experience thereby supporting the mentee in gaining a better understanding of the issue. This leads to,
3. Action: The mentor encourages new ideas and helps to agree action plans, with review, to support their mentee in moving forward on the issue.

2. The mentors' attitudes and core skills

A mentor should:

- Show interest in supporting the growth of a mentee's goals/objectives.
- Have an interest in building a personal relationship with the mentee and investing in the mentee's development.
- Value the learning and growth of the mentee.
- Be attentive, positive and constructive with the focus on the development of the mentee.
- Give space to reflect in these busy times, i.e. an awareness of the importance of reflection.
- Have the ability to create a trusting and open space for reflection, guiding the mentoring process (see number 1) and an awareness of the eight roles a mentor can play (appendix 2 below).
- Have the ability to give guidance and advice, insights and experience, e.g. to introduce the mentee to concepts, strategic thinking, projects or campaigns and to people to help widen their network: i.e. to support the mentee to navigate the organization and/or the project or campaign.
- Help the mentee set and achieve goals relating to the areas of development they identify as most important.
- And:
 - To plan and prepare for the meetings with the mentee
 - Be aware of the "don'ts": What a mentor should not do (appendix 3).

Mentor skills include:

- **Active listening** - not only establishes rapport but creates a positive, supporting environment that permits open communication
- **Building trust** - mutual trust is the basis of successful mentoring, i.e. effective mentoring can only happen in an open atmosphere of trust and confidentiality. Building trust is one of the first steps a mentor takes in the beginning of a mentoring relationship and there are 7 areas to this:
 - (1) Caring for the development of your mentee and creating a safe space to do so;
 - (2) Sharing each other's values;
 - (3) Mutual willingness to learn;
 - (4) Challenging appropriately and constructively;
 - (5) Reliability in honouring scheduled meetings and calls;
 - (6) Talking about concerns and developing the habits of self-disclosure and openness;
 - (7) Agreeing to keep confidentiality in conversations and other communications with the mentee.
- **Asking open questions** –by asking explorative questions rather than giving tips/advice or even imposing your own "solution", you can facilitate the mentee's thinking to find his or her own solution
- **Showing interest** in what the mentee is saying and reflecting back important aspects of what he or she has said to show that you've understood.
- **Giving constructive feedback** and (sometimes) providing guidance
- **Readiness to share experiences** (not imposing them), helping the mentee gain broader perspectives of his or her responsibilities and organization by sharing mistakes and successes you have encountered.
- And in general, mentors should have **self-awareness, self-confidence and behavioural awareness**.

- **Reacting in a** timely manner to communication.
- **Supporting the development of direction** and learning goals and helping build the mentee's capacity.
- Giving **encouragement and empowering the mentee** to develop their own strengths.
- Having a sense of **humour**
- **Being able to respond to a mentee's frustrations and challenges** with words of support, understanding, encouragement and praise (just knowing that someone is there to listen can be very helpful).
- **Networking**: Introducing the mentee to some of your (selected) colleagues who might be useful.
- **Enthusiasm** for the field/objective/goal: Enthusiasm is catching!
- **Openness to experimenting** and learning practices that are new to him/her or the field.
- Ability to **adjust the communication** to the personality style of the mentee.

See also visual refresher the 4' video "[Effective Mentors Attitudes and Skills](#)" Under Resources
-> Videos of the ngo mentoring website.

3. The first mentoring meeting

Some mentees may feel nervous meeting someone they don't know and talking about themselves or they may feel inferior to their mentor, as they have less experience. They may believe in the concept of mentoring, but don't know what to expect from the person they have been matched with. Here are some ideas to prepare for your first meeting:

- **By getting to know each other**, and becoming relaxed, you can start building trust (see ch. 2 above). To help your mentee to be relaxed and responsive, begin by establishing rapport together. The easiest way to do this and help them to be comfortable is to find areas of common ground in your lives. This may be around work issues, but don't be afraid to talk about your family, interests and hobbies as well. This will help your mentee to feel safe and start to build trust with you.
 - **Preparing for your 1st meeting:** Consider your experience in the areas your mentee wishes to develop skills and knowhow in. Also ask yourself what you want to get out of the mentoring relationship (it is a two-way learning experience) and let your mentee know why you're offering some of your time as it will help to develop their trust further.
 - **Agreeing how to work together:** Begin to agree how to work together, in particular, discuss both your expectations and confidentiality, but also the logistics of the relationship: frequency of contact, place/mode of meeting, length of sessions etc.
 - Start to develop direction and agree the **Mentoring Agreement**. What does the mentee want to focus on and why? Often this part of the dialogue generates the most focus and learning for the mentee as they clarify what is most important for them to work on within this mentoring relationship. If your mentee comes to the first meeting with very clear direction, then do challenge them on their thinking to ensure they are really working on the most important two or three learning objectives for them at this point in their life.
 - Don't rush your first meeting and if you need longer to develop the direction then leave this to your next conversation.
- ➔ See also visual refresher the video "**Prepare the First Meeting**" Under Resources -> Video on the ngo mentoring website

4. A mentoring agreement

It is important to clarify and align both of your expectations at the start of the mentoring relationship – for this the following areas need to be discussed and common understanding found. Sometimes the agreement will be very short, sometimes it will take some time to explore and agree. It can be agreed on an informal basis, or formal as a written agreement (see a model here).

Areas for the Mentoring agreement include:

- Confidentiality & boundary setting
- Learning goals and areas where the mentee would like to develop
- Responsibilities
- Meeting logistics
- Note taking
- Commitment to openness/honesty, giving & receiving feedback
- When and how to review and measure progress?

→ See **mentoring agreement checklist example**, in *appendix 4*

5. Tips for effective relationships & overcoming challenges

For an effective mentoring relationship:

- Review your relationship regularly.
- Prepare for and reflect on meetings (see checklist / guideline in appendix 5).
- Give constructive feedback.
- Encourage challenge within the relationship and challenge your mentee constructively.
- Have goal or objective clarity.

You are likely to have **reached a boundary** if you:

- Are being overly drawn into an issue
- Feel you lack the professional expertise to help
- Are being pulled into the details of your mentee's job role
- Are spending too much time on an issue and can't move forward
- Feel you are struggling with the content of your conversation.

To encounter **challenges in a mentoring relationship** is normal; to overcome them it might be helpful to:

- Review your original expectations
- Re-contract if you feel the relationship is veering off from the original agreement
- Give open and honest feedback to each other
- Challenge constructively
- Check your boundaries (see number 4)

We encourage you to review the things that are going well and not so well in your **mentoring relationship** around the mid-point of the mentoring journey, and here are some questions to ask yourself and/or your mentee:

- What do you appreciate about your mentee? And does she or he know that?
- What goals has the mentee set at the beginning and which did she or he partially or fully achieve? Have new goals - explicitly or implicitly - been added?
- What did you take out of the relationship as a mentor? What do you enjoy about the engagement? What would you like to change?
- You can ask the mentee the same questions.
- Are you both happy with the mentoring and have you met as often as you planned?
- Or have there been frequent meeting changes? Were there any frequent disturbance (noise, bad connection, etc.) - and if yes, how could that be changed?

6. Winding up the mentoring relationship

The end of a mentoring relation may be reached when:

- The mentoring programme is ending after an allocated time period or number of sessions.
- **You have achieved the outcomes** you agreed to work on and are running out of things to discuss.
- If **the mentee's goals or direction have changed significantly** or their specific needs have developed and they need a different type of learning support than mentoring, or another mentor with a different expertise.
- **Your conversations start to lack energy**, you are finding it difficult to sustain momentum in your discussions and you both feel it is time to move on.

Whatever the reason, do talk about it first and ensure wherever possible that it is a joint decision, and that you wind it up in a last meeting or as part of the last meeting. This way you will both be left feeling positive and comfortable about the relationship. If the closure is ignored or handled superficially, it can lead to feelings of loss and grieving, particularly if you have had a good relationship. In other words, don't just send an e-mail to close a relationship down. The conversation should be honest, respectful and provide constructive feedback to the other. So, manage your closure by:

- **Reviewing the relationship outcomes** and any outstanding objectives.
- **Share what you have learned** with each other - reviewing both the mentee's and the mentor's learning is key.
- **Celebrate your successes!** And exchange thoughts about your frustrations as well.
- And thank each other for the time and commitment that has been put into the relationship.
- Don't forget to discuss the future: Will you continue to meet or speak occasionally – either informally i.e. **'keep the door open'** for ad hoc conversations, or formally by winding the relationship up gradually over a period of months with longer periods between conversations.
- You may want to scope out **the mentee's future direction or action plan** together, for the mentee to work on with other support.
- **What or who will replace you?** Allow time to plan what comes next, maybe the mentee needs signposting to other types of support or to find a new mentor or coach. It is not your responsibility, but if requested by the mentee you might informally or formally support this transition. Helping the mentee to identify other resources in their learning network can be helpful too.

➔ See also visual refresher the short video "**Winding-Up**" Under Resources -> Video on the ngo mentoring website.

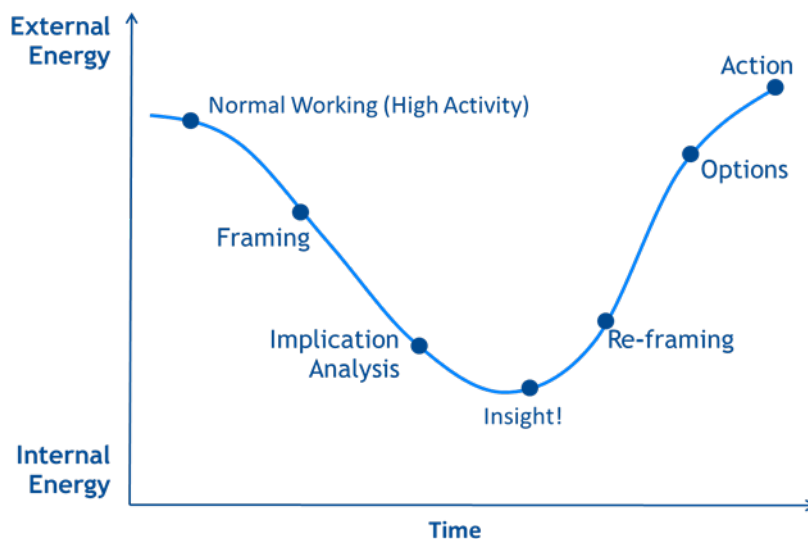
➔ Find a template in Appendix 6

Appendices

Appendix I

In addition to the 3-step-process model – Exploration -> New Understanding -> Action (see ch. 1) here is a more detailed model called

Phases of Reflective Space (PRS)



Taken from Coach Mentoring Ltd

- Normal Working: Thinking about what's urgent, not important.
- Framing (or acknowledgement): Focussing on one issue, giving it some initial definition or structure and identifying some boundaries so that it is easier (or at least clearer) to deal with.
- Implication Analysis: Trying to understand the issue from different perspectives.
- Insight: Breaking through into a deeper or different level of understanding.
- Re-framing: Drawing on logic and emotion to develop a new set of options or alternatives for dealing with the issues.
- Options: Generating new ideas on how to go forward.
- Actions: Getting started, e.g. making notes and phone calls.

Questions to help reflection

The type of questions used, their relevance and their capacity to stimulate reflection and understanding, are key. So, too, is the nature and depth of reflection – in particular, how well intellectual analysis and recognition of emotional values are integrated. Below are some examples of questions you might ask your mentee, which can also be especially useful in the beginning of your mentoring relationship. Note, it is not a list to go through, pick out those questions that feel right and authentic for you.

Questions to focus on an issue or a challenge (*exploration step*)

- What's keeping you awake this week? What's on your conscience?
- What have you been avoiding thinking about lately? ^[L]_[SEP]
- What's the main thing stopping you making progress? What's stopping you getting on with what you know to be important? What are you finding most difficult to get your mind around?
- What does your gut instinct tell you that you are doing wrong? ^[L]_[SEP]
- What issue do you think other people (colleagues, partner etc.) would like you to resolve?
- What opportunities are you missing? ^[L]_[SEP]
- If you could change one thing today, what would it be?
- From a more systemic point of view: What is happening "around the issue", that had or has influence? And in what way?

Questions to frame an issue (*exploration step*)

- Can you encapsulate the issue in one sentence?
- Who/what is involved? ^[L]_[SEP]
- What precisely is the dilemma? ^[L]_[SEP]
- What has prevented you sorting it out before now? (asked non-judgementally)
- How frequently does this issue arise?
- When is this an issue? ^[L]_[SEP]
- What positions have all the players adopted? ^[L]_[SEP]
- What are their/your motivations or interests or feelings? ^[L]_[SEP]
- How strongly do you/others feel about it? ^[L]_[SEP]
- What is the pressure to resolve/avoid dealing with this issue?
- How much of this is fact and how much is assumption? ^[L]_[SEP]
- What are the assumptions that you/others are making?

Questions to assess feelings/to talk about feelings (*exploration step*)

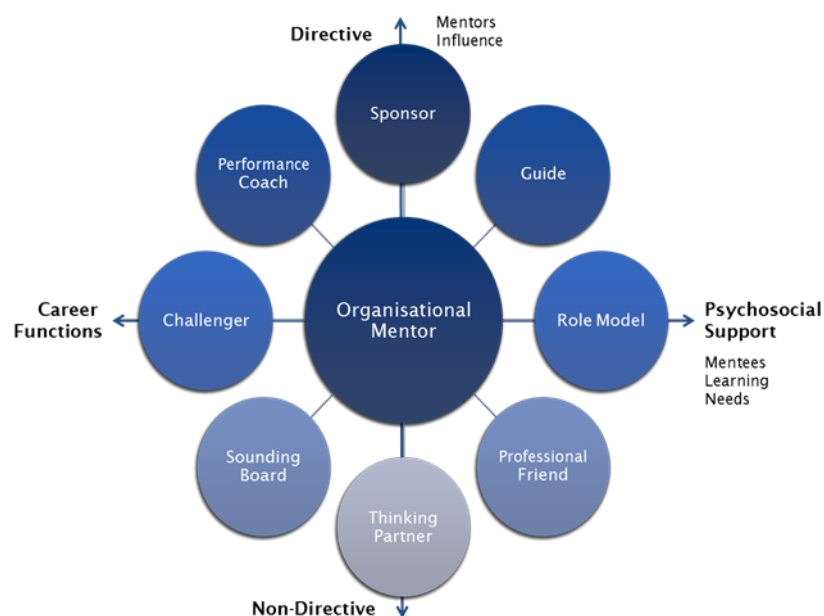
- What's your biggest fear/concern?
- What's frustrating you most right now?
- What you think others are thinking of you?
- How do you feel when you think of this dilemma?
- What would you feel better about, if you could get it off your chest? ^[L]_[SEP]
- How might you have contributed to the problem?
- How does this fit with your values? ^[L]_[SEP]
- What are you likely to regret?

Questions to analyse implications (*Action Planning; note, in this process step giving advice is okay*)

- Why does it matter? (to you, to others)?^[SEP]
- How does this fit into the big picture?^[SEP]
- What's the current impact? (on you, on others?) Is the impact short term or long term?
- What's at stake? (future impact)
- What happens if you don't resolve it?^[SEP]
- What are the forces acting on this issue on you?
- Can you draw a map of them?^[SEP]
- What lies behind each of those forces?^[SEP]
- Where is this issue leading?^[SEP]

Appendix 2

Roles of a Mentor



Being a **Sponsor** has the purpose of developing individuals' careers, promoting awareness of and opening up relevant opportunities for them to progress, and ensuring they feel motivated and engaged within the organization.

A **Guide** is someone who is there to help the mentee think through their options and provide appropriate advice and guidance on a range of topics. They are there to show the way by leading or advising, particularly through new situations and unexplored territories for the mentee.

A **Role Model** mentor is one where the mentee looks up to them and tries to emulate and copy their mentors (often unconsciously). The mentor can share stories of what they have experienced in their lives to support the mentee.

A **Professional Friend** is someone who will speak openly about issues with the mentee that colleagues and line managers may avoid. Mentors in this role always keep appropriate boundaries with their mentees so the friendship does not become intimate in a way that may be detrimental to the relationship.

The **Thinking Partner** will not interrupt or ask questions until the mentee has done all the thinking they want to do, whether talking aloud or when they are busy thinking silently. This is the least interventionist of all the mentoring roles.

A **Sounding Board** mentor supports the mentee in thinking through situations and whose reactions to suggested thoughts, opinions and ideas by the mentee are used as a test of their validity, likely success, effectiveness or acceptability before the mentee takes them any further.



A **Challenging** mentor uses a consistent level of challenge and critical debate to enable the mentee to access a point of new self-awareness, which is sometimes uncomfortable, but which helps the mentee to transform their views, knowledge and learning.

The **Performance Coach** supports their mentee in a specific area in order to improve their performance. It can be as simple as helping with preparing for an interview.

Appendix 3

Avoid the Typical Habits of a Toxic Mentor

These are habits you should AVOID:

1. Starting from the point of view that you – from your vast experience and broader perspective – know better than the mentee what’s in his or her interest.
2. Being determined to share your wisdom with them – whether they want it or not, nor reminding them frequently how much they still have to learn.
3. Deciding what you and your mentee will talk about and when; changing dates and themes frequently to prevent complacency sneaking in.
4. Doing most of the talking; checking frequently that they are paying attention.
5. Making sure they understand how trivial their concerns are compared to the weighty issues you have to deal with.
6. Reminding the mentee how fortunate s/he is to have your undivided attention.
7. Neither showing nor admitting any personal weaknesses; expecting to be their role model in all aspects of career development and personal values.
8. Never asking them what they should expect of you – how would they know anyway?
9. Demonstrating how important and well connected you are by sharing confidential information they don’t need (or want) to know.
10. Discouraging any signs of levity or humor – this is a serious business and should be treated as such.
11. Taking them to task when they don’t follow your advice.
12. Never, ever admitting that this could be a learning experience for you, too.

Appendix 4:

Mentoring Agreement Checklist

Mentee:

Name, contact details etc.

Mentor

Name, contact details etc.

Start date

When is your first call or meeting?

Frequency and type of mentoring conversation:

Eg, every 1st Friday of a month at 3pm one hour with zoom VC (schedule as much as possible in advance)

End date:

If already known, or if not an initial estimate (“e.g. minimum 6 months”) which can be changed anytime)

Other arrangements, e.g.

- *who initiates the calls:*
 - *how & when mentee shares agenda for the next call*
 - *how to behave/what to do if one cannot have a call as planned*
 - *closure agreement(s)*
-

Items to check / to talk about

- *Mentee’s learning & development goals & desired outcomes (known at the start)*
- *What are the expectations for the mentee and the mentor? What does each hope to get out of the mentoring relationship?*
- *Additional info mentee and mentor wish to share (i.e. more context)*
- *Further issues you may want to check-in, e.g. you could:
agree on how to give and receive feedback,
check whether and how you interact between the meetings (e.g. skype chat),
agree on how to prepare meetings (see link to templates below),
inform about any longer absences*
- *Commitment, confidentiality*
 - *Both committed to make calls,*
 - *Mentee is committed preparing the agenda and address needs to progress in work.*
 - *The mentee is the driver, i.e. manages the dates and prepares for the meetings*



- Confidentiality: Basic rule is that all that has been said in the mentoring discussions and in other communications is kept in confidence by both parties.

Find in Appendix 5 a checklist to prepare a mentoring meeting and reflection log.

Appendix 5:

Mentors' checklist for the mentoring meetings

Mentor's responsibilities

- Be reliable, show interest in your mentee, contribute actively to building trust - trust is very important.
- For meetings, mentors are principally responsible for the process, e.g. steering the meeting along the three steps process (without being overly strict - this is just an aid / a simple model).
 - Exploring the issue(s) the mentee faces together
 - Encouraging / challenging constructively to help the mentee see the issue from different perspectives with different viewpoints
 - Discussing how this impacts on next steps? E.g. Action points
- The mentor's task: a) Ask questions that makes the mentee think and that challenges them constructively. b) Try to understand and show empathy to the mentee without judging them.

The meeting itself:

1. Starting the meeting

Re-establish relation - how is your mentee? What is on her or his mind? Privately and professionally?

2. Looking back to the last meeting

Issue	What worked as intended and what not	Process reflection Conclusion - what to do differently next time

3. New issue(s) - according mentee's agenda, then go through the three steps described above:

- A) Explore B) Mentee changing perspectives (and you sharing experiences if it suits)
C) Action points

4. Wrap-up - confirm next meeting

And include from time to time the question, whether the mentoring relation is still giving value added to the mentee - in order to review and to adjust the direction, or to enter into the winding-up process.

Self-reflection - some questions you could use to reflect the mentoring and to prepare for future dialogue:

- What do I bring to the meetings from my experiences and knowledge?
- What do I know about the background of the mentee? And about their situation/context?
- Do I observe a change in the mentee as a result of the mentorship? Not sure?
- What assumptions about him or her work do I have, and what has led me to make these assumptions?
- How do I feel I am doing in the mentoring process? And what does this mean for the mentee?
- Do we both have the same understanding of terms such as "Conflict", "Process" etc.?
- What have I learnt from being a mentor? What can I do to improve my performance as a mentor?

Appendix 6:

Winding-up your Mentoring Relationship– a Checklist

Mentee Name	
Mentor	
Date of the mentorship Which mentoring programme? How many meetings?	
Outcomes a) with regard to the mentee’s goals (check the agreement). b) with regard to other unplanned aspects. c) not achieved? Any other thoughts or frustrations?	a) b) c)
What did the mentee learn? a) from mentee’s perspective b) from mentor’s perspective	a) b)
Learning What did you, the mentor, learn and want to share with your mentee?	
What comes next? You, as mentor, may want to scope out the mentee’s future direction or action plan together, for the mentee to work on with other support: Your thoughts or suggestions? Will you continue to meet (maybe less frequently, e.g. quarterly) or speak occasionally? Or leave it open?	
What or who will replace you? Allow time to plan what comes next, maybe the mentee needs signposting to other types of support or to find a new mentor or coach. It is not your responsibility, but if requested informal or formal support to do this would be good.	

Other actions



- Helping the mentee to identify other resources in their learning network.
- Celebrating your successes.
- Thank the mentee for the time and commitment that has been put into the relationship
-
-