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# **Mentoring Program Training Documents**

**Prepared for**

**Clemson Tigers ADVANCE Trailblazers:**

**Provost's Mentoring Initiative for Faculty**

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## **Sample Mentoring Agreement**

We are entering into a voluntary relationship that is expected to benefit both mentor and mentee.

This agreement is between the Mentee: \_\_\_\_\_ and the Mentor: \_\_\_\_\_

***Confidentiality:** We acknowledge that personal and professional confidences will be treated as such and that the parties will endeavor to maintain a relationship built on mutual trust, respect, and confidentiality.* Mentee initial \_\_\_\_\_ Mentor initial \_\_\_\_\_

### **Meetings:**

Frequency of Meetings: \_\_\_\_\_ Duration of Meetings: \_\_\_\_\_

Type of Meetings (face-to face, skype, phone): \_\_\_\_\_

Location of Meetings: \_\_\_\_\_

### **Contact Information:**

**Mentee:** \_\_\_\_\_

Email: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Cell Phone/text: \_\_\_\_\_

Preferred method of contact \_\_\_\_\_ Best time to contact \_\_\_\_\_

**Mentor:** \_\_\_\_\_

Email: \_\_\_\_\_

Office Phone: \_\_\_\_\_ Cell Phone/text: \_\_\_\_\_

Preferred method of contact \_\_\_\_\_ Best time to contact \_\_\_\_\_

Mentee's Primary Goals(s):

Mentor's Primary Goals(s):

*This mentoring agreement sets forth how the mentor/mentee will work together, agreeing to commit to the specified period, and to make a good faith effort to resolve any issues that may arise during the term of this agreement.*

Mentee's signature/date \_\_\_\_\_ / \_\_\_\_\_

Mentor's signature/date \_\_\_\_\_ / \_\_\_\_\_

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## **Mentoring Meeting Checklists**

These checklists are just a guideline to provide direction for meetings to make the most of your time.  
Checklists can be tailored to each meeting as needed.

It is strongly encouraged that mentors/mentees agree upon meeting agenda and have them sent out at least one week prior to meeting to provide ample time for preparation.

### **First Meeting**

#### ***Introducing Yourself***

- Share information about your professional and personal life
- Learn something new about your mentee/mentor

#### ***Set Expectations***

- When and where will we meet?
- How will we schedule meetings?
- What are our communication preferences? (email, text, phone, video chat)
- What are our preferred frequency and modes of communicating between meetings?
- What agenda format will we use?
- Will there be any fixed agenda items to be discussed at every meeting?
- How will we exchange feedback?
- How will we measure success?
- What is our responsibility for rescheduling any missed meetings?
- What are our expectations regarding confidentiality?
- Are there any “off-limits” conversations?
- How will we work with formalized mentee goals?

#### ***Mentoring Agreement***

- Review agreement, modify if desired, sign and exchange
- Review goals

#### ***Confirm Next Steps***

- Schedule date, time and place of future meetings
- Outline tasks/deliverables to be completed before that meeting

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## **Last Meeting**

Some formal mentoring relationships will transition to more informal relationships at the end of the program. Make sure you are both on the same page about how this will work – set boundaries and expectations.

- Have your mentoring goals been achieved?
- Have the important issues been discussed?
- How should the separation/redefinition be acknowledged?
- What would be the ideal interaction going forward?

## **Tips for Mentors**

### **Managing Your Mentoring Meeting**

- Outline your agenda format at your initial meeting with your mentee. Get your meetings on your calendars early and in advance! We're all busy. Set aside time at your first meeting.
  - Consider using the **10/20/60 Rule** developed by Feldman (2017 UCSF Faculty Mentoring Program)
    - **First 10 Minutes:** Engage in personal/professional "check-in"
    - **Next 20 Minutes:** Focus on 'front burner' issues (upcoming presentation, manuscript revision, etc.)
    - **Next 60 Minutes:** Discuss current and long-term goals and priorities  
Summarize discussion, clarify tasks, schedule follow-up meeting
- Obtain and review mentee's CV or any other relevant documents prior to meeting
- Clarify what mentee expects from you--and what you expect from mentee
- Review mentee's goals
- Be sure that you have accurate, up-to-date information on advancement and promotion policies for your mentee's series and rank (know your faculty handbook in and out)
- Be aware of potential conflicts of interest (tenure committees, supervisors, etc.)
- Know your limits as a mentor – can you recommend additional resources or mentors?

### **Building Trust**

| <b>Behaviors that Build Trust</b>                            | <b>Behaviors that Destroy Trust</b>        |
|--|--|
| Active listening<br>(put the phone down during your meeting) | Not paying attention to what is being said |
| Cooperating with others                                      | Being competitive                          |
| Actions are consistent with words                            | Actions contrary to words                  |
| Being your authentic self                                    | Acting with a hidden agenda                |
| Admitting mistakes/errors                                    | Blaming others for mistakes                |
| Honoring and respecting confidentiality                      | Breaking confidence                        |

*(Adapted from Feldman, 2017)*

### **Providing and Receiving Feedback**

Most individuals have a difficult time providing and receiving constructive feedback. There is a difference between reprimanding someone and providing coaching to improve self-awareness and development. Mentors and mentees should engage in reciprocal and on-going feedback. According to Valcour (2015), impactful feedback conversations have these three elements:

1. ***An intention to help them grow, rather than to show them they were wrong.*** The feedback should increase, not drain, motivation and resources for change. When preparing for a feedback conversation, reflect on what you hope to achieve and on what impact you'd like to have.

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2. ***Openness on the part of the feedback giver.*** If you start off feeling uncomfortable and self-protective, they will match that energy, and you'll each leave the conversation frustrated with the other person.
3. ***Inviting the individual into the problem-solving process.*** You can ask questions such as: What ideas do you have? What are you taking away from this conversation? What steps will you take, by when, and how will I know?

Here are some guidelines you can use to determine if you are providing effective feedback (as identified by Feldman, 2017).

***Effective feedback:***

- ✓ Is offered in a timely manner
- ✓ Focuses on specific behaviors
- ✓ Acknowledges outside factors that may contribute
- ✓ Emphasizes actions, solutions or strategies

***Effective Feedback from Mentee:***

- ✓ Is your guidance offered beneficial? Did it help to solve an issue?
- ✓ Does your communication style and/or actions facilitate a positive mentoring experience or create challenges?

***Effective Feedback to Mentee:***

- ✓ Can you identify your mentee's strengths and assets?
- ✓ What are the areas for development?
- ✓ Are there any behaviors or attitudes that could be detrimental to the mentee's development?
- ✓ What observations do you have about how your mentee may be perceived by others?

## **Tips for Mentees**

### **Making the Most of your Mentorships** (Feldman, 2017)

- ✓ Take initiative. You should have a clear plan for how often you want to meet, what path you would like to take, and what goals you would like to achieve. Don't wait for the mentor to come to you with ideas. Be prepared, have a plan.
- ✓ Be respectful of your mentor's time. Show up on time to meetings, stay organized, and communicate your goals prior to the meeting.
- ✓ Self-reflect and do a personal debrief after you meet with your mentor. What did you take away from the meeting? What did you learn?
- ✓ If a mentoring relationship is not working out, contact your program facilitator.
- ✓ Consider the following questions:
  - Are my goals specific and well defined?
  - Am I comfortable asking for feedback?
  - Am I open to hearing new ideas and perspectives?
  - Am I able to show I value and appreciate feedback?
  - Am I willing to change or modify my behaviors?
  - Do I consistently follow through on commitments?
  - Do I make an effort to instill trust?
  - Do I openly show appreciation and gratitude?

#### ***Specificity***

- Have you identified a specific objective for the mentorship?
- Are your objectives well defined?

#### ***Measurability***

- Are your objectives quantifiable in nature?
- Have you decided how to measure success?

#### ***Work Plan***

- Do you have an action plan to achieve your objectives?
- Have you considered the outcome of achieving your objectives?

#### ***Reality Check***

- Are your objectives realistic given the circumstances?
- Have you determined a completion date?
- Is your timeline realistic?
- Will you need additional resources or tools to be successful?

#### ***The Mentor's Role***

- How can your mentor be most helpful to you?



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## **Mentoring Activity Suggestions<sup>1</sup>**

- Both mentee and mentor review their CV with each other to create a foundation of what they have done and where they would like to go.
- Attend a professional meeting and introduce mentee/mentor to other professionals in the field.
- Schedule lunch or coffee to discuss what's going well, what's not going well, and ways to move forward at work.
- Include the mentee/mentor in one of your meetings or conference call as appropriate and discuss with them some of the tasks you are currently working on to help them understand your role better.
- Schedule lunch or a meeting with mentee/mentor and several other professionals in your field to discuss everyday challenges you may encounter in your work.
- Attend a training program, conference or lecture series together.
- Sign up to complete a volunteer activity together.
- Set goals with your mentee/mentor or develop an action plan to ensure your meetings stay on track.
- Role play how to address a particularly challenging situation your mentee/mentor may be having.
- Create a vision statement with your mentee/mentor that captures where he/she wants to be in five years and what he/she wants to be known for; review and discuss together.
- Talk about the types of people you find most difficult to work with and discuss strategies for more effective interactions with them.
- Ask your mentee/mentor to share their biggest weaknesses and figure out ways to strengthen skills in these areas.
- Review organizational charts to help the mentee/mentor understand who fits where.
- Describe the most challenging moment in your career and how you handled it.
- Share career stories. Stories could include the beginning of your career, changes you made along the way, or high and low points during your career.
- Exchange and discuss potentially useful articles.
- Invite mentee or mentor to a presentation he/she is delivering and debrief afterwards, or at your next session.
- Talk about mentors or role models you've had and how they impacted your life or career.
- Discuss the following question: What keeps you up at night regarding your position?
- Discuss some of the "unwritten rules" each of you has observed or learned about success in the workplace.

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<sup>1</sup> AMES Laboratory Mentoring Program (2013) <https://www.ameslab.gov/operations/human-resources/mentoring-program>

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## **Sample Mentoring Action Plan**

This table can be used to record topics you'd like to cover over the course of your mentorship. It can be adapted to meet your objectives.

| <b>Meeting</b> | <b>What topics would you like to discuss?</b> | <b>How will you prepare?</b> | <b>What is the follow-up plan?</b> |
|----------------|---|------------------------------|------------------------------------|
| <b>1</b>       |   |                              |                                    |
| <b>2</b>       |   |                              |                                    |
| <b>3</b>       |   |                              |                                    |
| <b>4</b>       |   |                              |                                    |
| <b>5</b>       |   |                              |                                    |

## **Mentee Development Plan (MDP)**

The aim of creating a development plan is to document a process of self-analysis, personal reflection, and honest appraisal of your strengths and weaknesses. This should enable you to evaluate the value of the mentoring and training you have received, and to consider your future development.

*What do I need to do?* This task is relatively short, succinct and designed to be helpful in evaluating your development. It enables you to reflect upon your recent experience and to focus on the next stage of your training and development. Start by thinking about your career plan by writing a personal mission statement.

**Creating your MDP has three stages as follows:**

**Stage 1 – Personal analysis.** The first stage is designed to analyze your strengths and weaknesses. You will be able to draw heavily upon your career and the outcomes of courses that you have attended. Support your strengths and weaknesses with specific examples from your experience, areas of opportunity, and any roadblocks to your continued success.

**Stage 2 – Setting goals.** This involves setting new and clearly definable goals for yourself, which are measurable. It is usually a good idea to seek input from your mentor, advisor, and/or supervisor.

**Stage 3 – Personal objectives.** This stage involves setting out your personal objectives. These can also be set in context within your career, which will be helpful in reinforcing its value.

**Stage 4 – Putting it all together.** After you have thought about these, complete the development plan attached. This should be a living document that you update regularly to track your career progression. Use this to create (or edit) your professional biography. Think about what you have accomplished as well as your future career aspirations.

- **Prioritize.** Identify development areas that will add the greatest value and make a difference.
- **Implement Something Every Day.** Chip away in small bite-sized pieces. Spending even five (5) minutes a day will make development a part of your daily discipline.
- **Seek Feedback and Support.** Learn from others. Ensure that feedback is relevant to your priorities.
- **Face your Barriers.** Development isn't easy. Address any barriers.
- **Involve Others.** Find people who can help you in your development by soliciting ideas and reactions from them and who will provide specific, candid feedback on both your strengths and weaknesses.
- When setting development activities, keep in mind the **SMART** model:
  - S** Specific
  - M** Measurable
  - A** Action-oriented
  - R** Realistic
  - T** Time-bound
- **Take Time to Reflect.** Ask yourself what worked and what didn't work, and why.
- **Transfer Learning into Next Steps.** Continue to focus on mastering a specific area, and then share this knowledge by teaching it to others. Regroup and focus on new goals and development activities as appropriate (time period may vary based on specific goals and activities).

## Sample Mentee Development Plan (MDP)

**Name:**

**Position:**

**Date:**

| <b>Section A: Career Plan</b>     |  |
|-----------------------------------|--|
| <b>Personal Mission Statement</b> |  |
|                                   |  |

| <b>Short-Term Career Goals (1-2 years)</b> |   |
|--|---|
| <b>Area of Interest/Position Title</b>     | <b>Competencies/Skills/ Knowledge Needed:<br/>(areas I need to develop)</b> |
|  |   |
|  |   |
|  |   |

| <b>Long-Term Career Goals (3-5 years)</b> |   |
|---|---|
| <b>Area of Interest/Position Title</b>    | <b>Competencies/Skills/ Knowledge Needed:<br/>(areas I need to develop)</b> |
|   |   |
|   |   |
|   |   |

| <b>Strength to Leverage –</b><br>select at least one strength to continue to build upon                               |  | <b>Area of Focus:</b>  |                                 |  |
|---|--|--|---------------------------------|--|
| <b>Critical Behaviors/Goals</b><br>What specific behaviors do I need to model or exhibit in this competency or skill? | <b>Developmental Activities/Action Steps</b> (assignments, coaching, formal training)<br><b>Remember SMART</b> | <b>Mentor’s Role</b><br>(or involvement of others if applicable) | <b>Target Dates/ Milestones</b> | <b>Results/Outcomes</b><br>How have I succeeded in adapting my behavior or learning new skills? (provide examples) |
|   |  |  |                                 |  |
|   |  |  |                                 |  |

| <b>Area to Develop –</b> focus on areas to develop that are critical to your performance; select 1 or 2 areas to work on at one time |  | <b>Area of Focus:</b>  |                                 |  |
|--|--|--|---------------------------------|--|
| <b>Critical Behaviors/Goals</b><br>What specific behaviors do I need to model or exhibit in this competency or skill?                | <b>Developmental Activities/Action Steps</b> (assignments, coaching, formal training)<br><b>Remember SMART</b> | <b>Mentor’s Role</b><br>(or involvement of others if applicable) | <b>Target Dates/ Milestones</b> | <b>Results/Outcomes</b><br>How have I succeeded in adapting my behavior or learning new skills? (provide examples) |
|  |  |  |                                 |  |
|  |  |  |                                 |  |

|                  |
|------------------|
| <b>Comments:</b> |
| <br><br><br><br> |

**Next development plan review date:** \_\_\_\_\_ (aim for every 3-6 months)

## Mentor Readiness Assessment

(Adapted from Allen, Finkelstein & Poteet, 2009, p. 115)

### Part I: Ability

Review the statements listed below and think about your own readiness to be a mentor. Select the response that corresponds to your readiness to perform that particular mentor behavior using the following scale.

|                      |                    |                      |
|----------------------|--------------------|----------------------|
| 1 = Not ready at all | 2 = Somewhat ready | 3 = Definitely ready |
|----------------------|--------------------|----------------------|

|  |   |
|--|---|
|  | 1. Help the mentee make contacts with senior leaders at the university.                 |
|  | 2. Provide positive recognition and constructive feedback to the mentee.                |
|  | 3. Share your knowledge of the university's unwritten rules.                            |
|  | 4. Give the mentee assignments that expose him or her to key figures in the university. |
|  | 5. Role model the way to get things done.   |
|  | 6. Help the mentee to develop a career path.  |
|  | 7. Give the mentee developmental guidance and advice as needed.                         |
|  | 8. Keep the mentee apprised of important events and goings-on.                          |
|  | 9. Help the mentee diagnose and assess his or her developmental needs.                  |
|  | 10. Provide the mentee with challenging assignments.                                    |

### Part II: Commitment and Willingness

Review the statements listed below and check the answer that is most appropriate for you.

|  | Yes | No |
|--|-----|----|
| 1. Are you willing to invest time, energy, and effort in a mentoring relationship?     |     |    |
| 2. Are you willing to help the mentee learn from his or her challenges and mistakes?   |     |    |
| 3. Are you willing to give honest feedback to the mentee?                              |     |    |
| 4. Are you willing to share the learning from your failures as well as your successes? |     |    |

5. Listed below are some common concerns as well as potential benefits. Check those concerns and benefits most important to you.

|  | Concerns                                   |  | Benefits   |
|--|--|--|--|
|  | Time commitment                            |  | Opportunity to help develop someone                    |
|  | Perception of bias and fairness            |  | Opportunity to improve my coaching and feedback skills |
|  | Lack of chemistry with mentee              |  | Contribute to the university's success                 |
|  | Any problems will be held against me       |  | Leave a legacy with the university                     |
|  | My ability to provide valuable experiences |  | Build my support network                               |
|  | My ability to coach and give feedback      |  |  |

6. Do the benefits outweigh the concerns? Yes / No

## Mentor Profile Form

(Adapted from Allen, Finkelstein & Poteet, 2009, pp. 119-121)

*Part I: Please complete all sections of this form so the faculty development committee can learn as much about your background as possible. This information will only be used to pair you with a suitable mentee.*

|   |
|---|
| Current job role and responsibilities:  |
| How long have you worked in your current position? How long have you worked at the university?  |
| What knowledge, skills or abilities do you believe you excel at?<br><input type="checkbox"/> Influence<br><input type="checkbox"/> Planning & organization<br><input type="checkbox"/> Adaptability<br><input type="checkbox"/> Oral communication<br><input type="checkbox"/> Written communication<br><input type="checkbox"/> Stress tolerance<br><input type="checkbox"/> Interpersonal skills<br><input type="checkbox"/> Change management<br><input type="checkbox"/> Other (please specify)<br><input type="checkbox"/> Strategic thinking<br><input type="checkbox"/> Leadership<br><input type="checkbox"/> Motivation<br><input type="checkbox"/> Coaching and developing others<br><input type="checkbox"/> Problem-solving<br><input type="checkbox"/> Teamwork<br><input type="checkbox"/> Decision-making<br><input type="checkbox"/> Delegation |
| Educational background [degree(s), school(s)]:  |
| Divisions/departments/functions other than yours that you interact/work with:   |
| Hobbies/interests:  |
| What do you hope to gain by being a mentor?   |
| What are you looking for in your ideal mentee? What abilities, skills, personality characteristics, and knowledge areas would he or she have?   |
| What are you hoping you can provide to your mentee? In what ways can you help him or her?   |
| How often do you travel as part of your position?   |
| What do you foresee as the major obstacles you will encounter in providing quality mentoring?   |

## Evaluating the Mentoring Relationship

### Mentor/Mentee Level

1. Do we believe we are a suitable match?
2. How often have we met?
3. Do we feel energized after meeting?
4. Are we satisfied with the amount of time we are investing?
5. What did we set out to accomplish together?
6. How do we believe we're doing?
7. Should we shift our goals at all?
8. How are we doing in honoring the agreements we made in our Mentoring Agreement?
9. What are we each doing "right" that has made this partnership work as well as it has?
10. What signals did we give that demonstrated we could trust each other?
11. Did we accomplish our mentoring goals?
12. What do we appreciate about each other?
13. How have we helped each other grow?
14. If this were the last time we were ever going to see each other, what would we want to be sure to express in the way of gratitude?
15. In what specific ways have we observed the mentoring program improving the university?
16. How can we apply what we learned in the program to other aspects of our job/relationships?



## Sample Mentoring Reaction Form

(Adapted from Allen, Finkelstein & Poteet, 2009, pp. 119-121)

Scale: 1 (Strongly Disagree) to 6 (Strongly Agree) and N/A

1. The mentoring I received has helped me learn new skills.
2. The mentoring I received has improved my performances.
3. The mentoring I received has improved my commitment to this university.
4. The mentoring I received has prepared me for broader responsibilities.
5. The mentoring I received has helped broaden my network.
6. The mentoring I received has helped ease my adjustment into my new role.
7. My mentor provided me with timely feedback.
8. My mentor gave me frequent constructive feedback and coaching.
9. The mentoring relationship has been a valuable use of my time.
10. I am satisfied with the amount of mentoring I received.
11. I am satisfied with the quality of mentoring I received.
  
12. Additional comments to clarify ratings:
13. In what ways have you developed, progressed, or improved as a result of your mentoring relationship?
14. Please note any changes you would like to see made to the mentoring program.

## Relationship Quality

(Adapted from Allen & Eby 2003)

Scale: 1 (Strongly Disagree) to 6 (Strongly Agree)

### Can be given to mentors and mentees

1. The mentoring relationship between my mentee and I was very effective.
2. I am very satisfied with the mentoring relationship my mentee and I developed.
3. I was effectively utilized as a mentor by my mentee.
4. My mentee and I enjoyed a high-quality relationship.
5. Both my mentee and I benefited from the mentoring relationship.

## **Relationship Learning**

(Adapted from Allen & Eby 2003)

Scale: 1 (Strongly Disagree) to 6 (Strongly Agree)

**Can be given to mentees and mentors.**

1. I learned a lot from my mentor.
2. My mentor gave me a new perspective on many things.
3. My mentor and I were “co-learners” in the mentoring relationship.
4. There was reciprocal learning that took place between my mentor and I.
5. My mentor shared a lot of information with me that helped my own professional development.

## **Mentor Rating of Mentee Performance**

Scale: 1 (Poor) to 6 (Excellent)

1. How would you rate your mentee’s overall current performance?
2. How would you rate your mentee’s overall potential for advancement?

## **Satisfaction with the Mentorship**

Scale: 1 (Very Dissatisfied) to 6 (Very Satisfied)

**Can be given to mentees and mentors**

1. Overall, how satisfied were you with your mentoring relationship?

## Additional Resources and References

### Mentoring Resources

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