THE MENTOR'S GUIDE
Facilitating Effective Learning Relationships
Lois J. Zachary
Foreword by Laurent A. Daloz
## EXHIBIT 1.1
Elements in the Learner-Centered Mentoring Paradigm

<table>
<thead>
<tr>
<th>Mentoring Element</th>
<th>Changing Paradigm</th>
<th>Adult Learning Principle</th>
</tr>
</thead>
</table>
| Mentee role         | From: Passive receiver  
To: Active partner                                                                   | Adults learn best when they are involved in diagnosing, planning, implementing, and evaluating their own learning.                                             |
| Mentor role         | From: Authority  
To: Facilitator                                                                       | The role of the facilitator is to create and maintain a supportive climate that promotes the conditions necessary for learning to take place.              |
| Learning process    | From: Mentor directed and responsible for mentee's learning  
To: Self-directed and mentee responsible for own learning                             | Adult learners have a need to be self-directing.                                                                                                          |
| Length of relationship | From: Calendar focus  
To: Goal determined                                                                   | Readiness for learning increases when there is a specific need to know.                                                                                   |
| Mentoring relationship | From: One life = one mentor; one mentor = one mentee  
To: Multiple mentors over a lifetime and multiple models for mentoring: individual, group, peer models | Life's reservoir of experience is a primary learning resource; the life experiences of others add enrichment to the learning process.                        |
| Setting             | From: Face-to-face  
To: Multiple and varied venues and opportunities                                         | Adult learners have an inherent need for immediacy of application.                                                                                       |
| Focus               | From: Product oriented: knowledge transfer and acquisition  
To: Process oriented: Critical reflection and application                                | Adults respond best to learning when they are internally motivated to learn.                                                                               |
EXERCISE 1.2
Reflecting on Your Time Line

Instructions: Think about your mentoring experiences and the people who were there to guide you, support you, and strengthen you.

My mentors were:

At what point along your journey did they come into your life?

What were those experiences like?

What wisdom have you gained from each of your mentors?

What did you learn about being a mentor?

What is it you learned that might contribute to your own development as a mentor?

What did you learn about being a mentee?
### Mentee Time Line

Instructions: What do you imagine your mentee's journey has been? Start with the present and work backward. Think broadly, filling in known milestones, experiences, and events along the time line in the box.

<table>
<thead>
<tr>
<th>Time Line</th>
</tr>
</thead>
</table>

1. What more do you need to know about your mentee in order to have a better sense of his or her journey?

2. If there is more information that you need, what questions will you ask your mentee? What information can you gather from other sources?

3. What insights does your mentee's journey raise for you about your mentee's readiness to learn?
EXERCISE 1.5

Using Experience to Ground Your Work

Instructions: The purpose of this exercise is to provide you with a fresh perspective on how it feels to reflect on experience consciously and to learn from it—what it feels like to "sit at the feet of your own life and be taught by it" (Berends, 1990, p. 8). It will put you in touch with some experiences you have had that can assist you in facilitating the learning of a mentee.

1. Jot down bulleted responses or words that come to mind for questions 1 through 4.
2. At another time, review your answers to see if they trigger additional responses.
3. Complete the reflection questions after you have reviewed your answers.
4. Alternatively, or in addition, you may want to ask mentees to complete this exercise and discuss what the experience of reflecting on experience was like with them. In this way you can position the learning, saying that "part of learning is reflecting on experience; this will give you a preview of what that is like."

1. What have you learned from mistakes you have made?

2. What have you learned from your successes?

3. What dilemmas do you face on a daily basis?

4. What are lessons have you learned from those experiences?

Reflection

1. What was it like to address these questions?

2. How would you rate the level of difficulty?

   Easy ___________________________________________ Difficult

3. What did you learn about yourself in going through this exercise?
**EXHIBIT 2.1**

**Points of Connection**

<table>
<thead>
<tr>
<th><strong>What to Do</strong></th>
<th><strong>How to Do It</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Invest time and effort in setting the climate for learning.</td>
<td>Determine mentee learning style and learning needs.</td>
</tr>
<tr>
<td>Be sensitive to the day-to-day needs of your mentee.</td>
<td>Spend time connecting with your mentee. Ask enough questions to give you sufficient insight into your mentee's work context.</td>
</tr>
<tr>
<td>Identify and use multiple venues for communication.</td>
<td>Explore all available options: e-mail, videoconference, new Web-based technologies, telephone, mail, and emerging technology—and use more than one. Look for opportunities to connect face-to-face, even at a long distance.</td>
</tr>
<tr>
<td>Set a regular contact schedule, but be flexible.</td>
<td>Agree on a mutually convenient contact schedule, and make sure it works for you and your mentee. If you need to renegotiate a scheduled appointment, use that situation as an opportunity for connection and interaction.</td>
</tr>
<tr>
<td>Check on the effectiveness of communication.</td>
<td>Ask questions: Are we connecting? Is the means we are using working for us? Is it convenient?</td>
</tr>
<tr>
<td>Make sure that connection results in meaningful learning.</td>
<td>Is learning going on? Is the mentee making progress?</td>
</tr>
<tr>
<td>Share information and resources—but never as a substitute for personal interaction.</td>
<td>Set the stage to share information. Then share the information and follow up once the information is shared.</td>
</tr>
</tbody>
</table>

Conversations or exchanges take place. Knowing which to use and when to use it is advantageous.

Mentors can monitor the communication that takes place by following these guidelines:

- Actively listen.
- Check out assumptions about what is going on periodically.
EXERCISE 4.1

Mentor Motivation Checklist

Instructions: For each item below, put a check in the “yes” column if the reason listed reflects why mentoring appeals to you. If it does not, put a check in the “no” column. Following each item, list concrete examples to illustrate your answer.

<table>
<thead>
<tr>
<th>Reasons That Mentoring Appeals to Me</th>
<th>Yes</th>
<th>No</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like the feeling of having others seek me out for advice or guidance.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I find that helping others learn is personally rewarding.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have specific knowledge that I want to pass on to others.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I enjoy collaborative learning.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I find working with others who are different from me to be energizing.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I look for opportunities to further my own growth.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ers underneath. What you find will depend on how truly candid and self-reflective you can be.

Sally is looking for assistance in developing her fledgling packaging business. Leonard, a retired small business owner himself, has volunteered to mentor her as part of the Small Business Association’s business mentoring program. His primary motivation for mentoring her is his felt obligation to give back some of the wisdom he gleaned from other businesspeople who helped him get started. In peeling back his onion, he discovers that his motivation came from a feeling of loneliness and a lack of stimulation; since his retirement, he was no longer interacting with other business owners.

Exercise 4.2 offers an opportunity to pull back the layers and explore motivation further. Complete the first sentence stem stating your primary motivation for being a mentor. This sentence becomes the starting point for the remainder of the exercise. Before you identify your first reason, ask
EXERCISE 4.2
Identifying Mentor Motivation

Instructions: Complete each of the following sentences. Although you may be tempted to stop after you have identified the first reason, continue to work your way down the page. Consider motivations that might underlie each reason you have identified. When you run out of steam, push yourself a little further or wait until another time and come back and complete this exercise.

My motivation for mentoring is …

Reason 1

Reason 2

Reason 3

My primary motivation for mentoring is …
EXERCISE 4.3
Assessing Readiness for This Mentoring Relationship

Instructions: Answer each of the following questions so that you are clear as to why you want to engage in this particular relationship at this time.

1. I want to be a mentor because …

2. I want to participate in this mentoring relationship because …

3. My experience and expertise will contribute to this relationship by …

4. Specific things I can and am willing to do to help this individual are …

5. Therefore, I will …
## EXHIBIT 4.2

### Strategies and Considerations for Initial Conversations

<table>
<thead>
<tr>
<th>To-Do List</th>
<th>Strategies for Conversation</th>
<th>Mentor Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take time getting to know each other.</td>
<td>Obtain a copy of the mentee's bio in advance of the conversation. If one is not available, create one through conversation.</td>
<td>Establish rapport. Exchange information. Identify points of connection.</td>
</tr>
<tr>
<td>Talk about mentoring.</td>
<td>Ask: Have you ever before been engaged in a mentoring relationship? What did you learn from that experience?</td>
<td>Talk about your own mentoring experiences.</td>
</tr>
<tr>
<td>Determine the mentee's goals.</td>
<td>Ask: What do you want to learn from this experience? Give the mentee an opportunity to articulate broad goals.</td>
<td>Determine if the mentee is clear about his or her own goals and objectives.</td>
</tr>
<tr>
<td>Determine the mentor's relationship needs and expectations.</td>
<td>Ask: What do you want out of the relationship?</td>
<td>Be sure you are clear about what your mentor needs or wants from this mentoring relationship. If you are not, encourage the mentee to think through what he or she wants from the relationship.</td>
</tr>
<tr>
<td>Define the deliverables.</td>
<td>Ask: What would success look like for you?</td>
<td>Do you have an area of experience or expertise that is relevant to this person's learning goals?</td>
</tr>
<tr>
<td>Share your assumptions, needs, expectations, and limitations candidly.</td>
<td>Ask for feedback. Discuss: Implications for relationship.</td>
<td>What you are willing and capable of contributing to the relationship?</td>
</tr>
<tr>
<td>Discuss options and opportunities for learning.</td>
<td>Ask: How would you like to go about achieving your learning goals? Discuss ways: learning and communication styles. Ask: What is the most useful kind of assistance I can provide? Discuss means: Shadowing, project?</td>
<td>Discuss implications of each other's styles and how that might affect the relationship.</td>
</tr>
</tbody>
</table>
**EXERCISE 4.8**  
**Preparing: A Readiness Checklist**

Instructions: Review the list below, and check all items that apply to you with respect to your prospective mentoring relationship.

1. ___ I have a sincere interest in helping this person succeed.
2. ___ There appears to be mutual interest and compatibility.
3. ___ Our assumptions about the process are congruent.
4. ___ I am clear about my role.
5. ___ I am the right person to help achieve these goals.
6. ___ I can enthusiastically engage in helping this person.
7. ___ I am willing to use my network of contacts to help this individual.
8. ___ I can commit adequate time to mentoring this person.
9. ___ I have access to the kind of opportunities that can support this person’s learning.
10. ___ I have the support that I need to be able to engage in this relationship in a meaningful way.
11. ___ I am committed to developing my own mentoring skills.
12. ___ I have a mentoring development plan in place.
**EXERCISE 6.3**

**Mentoring Partnership Reflection: A Discussion Guide**

Instructions: There are three ways to use this form: (1) Each mentoring partner completes this form independently and then discusses individual responses. (2) Mentoring partners discuss each item and complete the form together. (3) Each time a mentoring partnership reflection is completed, it is saved and used as a starting point for conversation or as a follow up to (1) above.

**Meetings**

1. When and under what circumstances did we get together?

2. Generally when we got together, what did we talk about? (List subjects or topics.)

3. What objectives are we working on right now? What is our progress to date in achieving these objectives?

**Relationship**

1. What is going particularly well in our mentoring relationship right now?

2. What has been our greatest challenge in our mentoring partnership so far?

3. What do we need to work at to improve our mentoring relationship?

4. What assistance could we use?

**Learning**

1. What are we learning about ourselves? Each other? The relationship?

2. What is being learned? What are some of the conditions that promote that learning?

3. What are some of the personal insights? Hunches? Things to watch for?
## EXHIBIT 6.3

### Tips for Mentors in Providing Feedback

<table>
<thead>
<tr>
<th>What to Do</th>
<th>How to Do It</th>
<th>Example</th>
</tr>
</thead>
</table>
| Align your feedback with the mentee’s agenda.                             | Provide real-time feedback. Make it usable and realistic. Offer concrete practical steps and options. | “I have a few ideas that might help …”  
“What works for me is …” |
| Provide feedback about behavior that the mentee can do something about.   | Stay with the mentee’s behavior rather than succumb to the temptation to evaluate it. | “Tell me about the impact of the behavior …”  
“How might someone else see that behavior?” |
| When you talk from your perspective, remember that your reality is not the mentee’s reality. | When you talk about your own experience, set a context and be descriptive so that the mentee can see the parallels. | “In my experience, which was …, I found that … I know that is not your situation, but maybe there is something to learn here.” |
| Check out your understanding of what is being said.                      | Listen actively. Clarify and summarize.                                     | “If I understand what you are saying …”  
“Help me understand what you mean by …” |
| Use a tone of respect.                                                    | Take care not to undermine the mentee’s self-esteem.                        | “I liked the way you …”  
“I am curious …”  
“I wonder …”  
“Have you ever considered …?” |
| Be aware of your communication style and how that works with that of your mentee. | Share information about communication styles with your mentee, and discuss the implications for the feedback cycle. | “I find that I get defensive when …”  
“I react positively to …” |
| Avoid giving feedback when you lack adequate information.                | Ask for time to get the information you need. Faking it doesn’t work.        | “To be honest with you, I need to think about that a little more.” |
| Encourage the mentee to experience feedback as movement forward rather than interruption from the journey. | Continuously link progress and learning to the big picture and the journey. | “When we started out … And then … And now …” |
EXERCISE 6.7
Enabling Questions: A Readiness Checklist

Instructions: Answer each of the questions below, adding examples after each response.

• "Am I providing adequate support to facilitate the learning of my mentee?"

• Have we identified sufficient and varied opportunities and venues for learning?

• Are we continuing to build and maintain a productive relationship?

• Is the quality of our mentoring interaction satisfactory?

• Are we continuously working on improving the quality of the mentoring interaction?

• Are we continuing to work at maintaining the trust in this relationship?

• Have we put in place a variety of mechanisms to ensure continuous feedback?

• Is the feedback I am giving thoughtful, candid, and constructive?

• Do we make time to reflect on our partnership regularly?

• Are there lurking dangers or subjects too difficult to discuss in the mentoring relationship?
EXERCISE 7.2
Turning Closure into Learning: Mentor Self-Reflection

Instructions: Use the following sentence stems to reflect on what you have learned from your mentoring relationship.

1. What I have learned about myself …

2. My mentoring gifts and strengths …

3. What I wish I could learn to do better …

4. How I will apply what I have learned …

5. Specific steps for applying what I have learned …