UNC HEALTH℠

Mentor Reference Guide

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OVERVIEW OF MENTORING

Welcome

Welcome to the Mentor Reference Guide!

This guide was developed to provide you with the basic concepts and benefits of being a mentor and to provide you with tips, tools and suggestions for your interactions.

Mentoring helps provide resources for mentees to identify short and long-term professional development needs and goals, to network with and learn from experienced leaders, and to promote individual growth.

The ultimate success of mentoring relationships relies upon the nature of your meetings, your openness with each other, applicable feedback, setting goals, and consistently raising the bar on the interactions to aid the mentees in their journey to the next level.

What is Mentoring?

Mentoring is most often defined as a professional relationship in which an experienced person assists another in developing specific skills and knowledge that will enhance the less-experienced person's professional and personal growth. Although your role is to help your mentee grow and learn, this is an opportunity for you to learn as well.

Mentee Specific Benefits

- Gains from the mentor's expertise
- Receives critical feedback in key areas and unique opportunity for individualized feedback
- Professional development in key job areas
- Learns (about) specific skills and knowledge that are relevant to personal goals
- Networks with experienced leaders and employees
- Gains knowledge about the organization's culture
- Support to share ideas, frustrations, and successes
- Greater understanding of the organization's structure and business

Mentor Specific Benefits

- Self-growth & self-awareness
- Improve leadership skills
- Expansion of professional network
- Gains satisfaction in sharing expertise with others
- Re-energizes the mentor's career
- Unique insight into the organization and business
- Increased understanding of other areas/roles
- Helps increase engagement levels

ROLES AND RESPONSIBILITIES

Role of Mentors

Mentors provide guidance, advice, feedback, and support the mentee. Mentors also act as a role model, counselor, sponsor, advocate, and ally. Mentors must also build rapport and trust with their mentees to establish supportive and authentic relationships.

Role of Mentees

Mentees roles depend on their need, experience, and the nature of the mentoring relationship. Mentees also play a role in building rapport and trust with their mentors and can be established through communicating openly and honestly, valuing the mentor's time, and demonstrating ethical and professional behavior.

What Mentoring IS and IS NOT

✔ **Mentoring is…**	✘ **Mentoring is not…**
❖ **A development tool** Helps develop knowledge, networks, and careers.	❖ **A guarantee of promotion** Mentor relationships do not guarantee promotions or advances but instead enable growth and increased job performance.
❖ **A knowledge sharing opportunity** Promotes knowledge sharing and facilitates the flow of information throughout the organization.	❖ **A replacement for formal development** Mentor relationships do not replace formal or professional training.
❖ **An organizational culture enhancer** Helps teammates better understand the organization's operations, policies, and culture.	❖ **A management replacement** Mentors do not take responsibility as the mentee's manager.
❖ **Candid and specific** Provides honest, specific, and timely feedback to promote growth.	❖ **Personal counseling** Mentors do not provide mental or behavioral health services.

Responsibilities of Mentors

☑	Meet on a regular basis	☑	Commits to fostering the relationship during the specific period of time
☑	Provide quality feedback	☑	Actively listens to the mentee
☑	Be available for scheduled/unscheduled conversations	☑	Reviews goals and objectives with mentee
☑	Provide positive facilitation and development experiences	☑	Respects mentee's limits and states their own

Responsibilities of Mentees

☑	Fully engage in the relationship	☑	Identify and track goals
☑	Be open to constructive feedback	☑	Critically engage all new experiences and lessons learned – track and organize in mentee journal
☑	Set meetings and agendas	☑	Take an active role in own learning and development
☑	Follow-up on action items	☑	Follow through on all commitments and value the mentor's time and experiences

How to Be A Great Mentor

A mentoring relationship requires work, commitment, and follow-through from the mentor and mentee. Great mentors possess several characteristics. They include:

	Motivation		Team player
	Communication skills		Committed
	Enjoy learning		Positive Attitude

Ask yourself the following questions to perform a self-assessment of your mentor strengths, challenges, and weaknesses.

1. What are my strengths as a mentor?
2. What are my challenges as a mentor?
3. What resources can I utilize to compensate for my weaknesses?

What Type of Mentor Are You?

Being a mentor is personal, dynamic, and can take many different forms. Each mentor has a specific mentor type they naturally gravitate towards while others practice skills of other types. A list of mentor types is below. Read through the different types, descriptions, and ways each is effective and ineffective and identify which one best describes you and your mentoring style.

Mentor Type	Description	Effective vs. Ineffective	
Advisor	An advisor is someone who makes suggestions and recommendations on what their mentee should do. Advisors also give advice based on their experiences.	❖ Acts as sounding board ❖ Maintains confidentiality	❖ Fixes problems for mentees ❖ Assumes responsibility for the mentee
Developer	A developer is like a coach but has no specific goals for performance improvements. Developers are good listeners and can point out red flags and positive qualities in mentees.	❖ Gives structure & direction ❖ Provides guidance based on observations ❖ Empowers mentee to handles their own problems	❖ Dictates & controls learning ❖ Looks for quick fixes ❖ Tells mentees what to do
Broker	A broker connects mentees with opportunities to grow. Brokers do not give possibilities for growth but rather connects the mentee with an expert in the mentees desired area. Brokers are great for mentees who desire continual learning.	❖ Identifies skills or competency gap ❖ Identifies & facilitates development opportunities	❖ Allows for personal bias ❖ Withdraws, does not follow-up
Challenger	A challenger focuses on challenging the mentee by pushing back and having the mentee focus on other possible solutions.	❖ Positively pushes mentee to higher standards ❖ Helps mentee explore other opportunities	❖ Challengers can push too far ❖ Mentee can feel as if thoughts are discounted

Clarifier	A clarifier focuses on clarifying issues for mentees rather than directing. Clarifiers can quickly fill gaps in knowledge and are great for mentees who do not need a lot of more structured guidance.	❖ Teaches organizational values & politics ❖ Increase knowledge base	❖ Removes obstacles so mentee does not have to deal with organizational politics
Affirmer	An affirmer focuses on being great listeners and mentees can trust that their mentor will talk through issues with them.	❖ Offers needed support ❖ Shows empathy & understanding	❖ Can provide too much feedback
Sponsor	A sponsor helps mentees meet the people who will make a difference in their career. Sponsors usually have large networks and credibility to support mentees.	❖ Provides visibility of the mentee ❖ Recognizes the mentee	❖ Promotes mentee at expense of others
Protector	A protector helps their mentee prepare for growth by making sure they do not make major career mistakes.	❖ Acts as safety net & supporter ❖ Offers a safe environment	❖ Can be too protective

TRUST, FEEDBACK, & TIPS AND TRICKS

Building Trust

When people trust each other, they allow their most authentic self to emerge. They feel free to share concerns, insecurities, doubts, successes, mistakes, and learned experiences. Listening to each other builds trust. Sharing reservations and uncertainties builds trust. Most importantly, demonstrating trustworthy behavior and actions builds trust.

Behaviors that Build or Destroy Trust

Behaviors that Build Trust	Behaviors that Destroy Trust
Being a proactive listener	Not paying attention
Cooperating with others	Being competitive
Openly sharing and being vulnerable	Withholding and keeping people out
Actions are parallel to words	Actions are contrary to words
Accepting and non-judgmental	Criticizing and disapproving
Authentic and true to self	Acting with a hidden agenda
Freely admitting mistakes and errors	Blaming others for mistakes
Actively seeking out different perspectives	Keeping a closed mind
Encouraging others to succeed	Discouraging others from taking risks
Having a positive outlook	Projecting a negative perspective
Honoring and respecting confidentiality	Breaking confidence

Giving and Receiving Feedback

Mentees want to receive honest, candid feedback from their mentor. Equally important is the feedback mentees can offer to mentors. Engaging in reciprocal and on-going feedback is a vital component of the partnership.

Effective feedback:

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

Effective Feedback from Mentee

- Whether the advice or guidance you offered was beneficial and solved an issue
- Whether the mentor communication style and/or actions create challenges to a positive mentoring experience

Effective Feedback to a Mentee

- Mentee strengths and assets
- Areas for growth, development, and enhancement
- Harmful behaviors or attitudes

Mentor Do's and Don'ts

Do	Don't
Listen actively	Fix the problem
Support and facilitate networking	Take credit
Lead by example	Take over
Be aware of role conflict	Threaten, coerce, or use undue influence
Promote independence	Condemn

Mentee Do's and Don'ts

<u>Do</u>	<u>Don't</u>
Take initiative	Be passive
Value mentor's time	Be late or stay in your comfort zone
Share agenda/goals with mentor prior to meeting	Throw something together just before the meeting
Clarify goals and expectations	
Practice self-reflection	
Keep resume, CV, journal, and individual development plan up to date	
Clarify your values	

First Meeting Checklist

Get to Know Each Other

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

Establish Guidelines

- When, how, and where will we meet?
- How will we schedule meetings?
- How will we communicate 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?

Partnership Agreement

- A review partnership agreement, sign, and exchange

Confirm Next Steps

- Schedule date, time, and place of future meetings

PARTNERSHIP AGREEMENT AND INDIVIDUAL DEVELOPMENT PLAN (IDP)

Mentoring Partnership Agreement

As a mentor and mentee in this partnership, we agree to abide by the following set of guidelines:

1. Commit to making the time to meet on a regular basis.

    a. Once a month for twelve months (60-minute durations)

2. Keep the content of our conversations confidential, professional, and beneficial.

3. Practice active listening.

4. Provide each other with honest, direct, and respectful feedback.

5. Other:

_____
_____
_____
_____
_____.

_____

Mentor Signature & Date

_____

Mentee Signature & Date

Individual Development Plan (IDP)

IDPs are tools used to assist in personal and professional development and growth. By design, it is to help employees reach both short and long-term goals. The following IDP plan template was adapted from Jenn Labin's *Mentoring Programs that Work* (2017) and can be used as a guide.

Date/Version	This is an ongoing process that should be updated regularly. Dating or versioning the document is a good way to track recent changes.
Mentee Name/Title Mentor/s Name/Title	Name of mentee, mentor/s, job title, and department.
Desired Next Role	What is the role you would like to reach for next? This may not be a formal title change; it might include additional responsibilities or stretch assignments.
3 Strengths	Before thinking about areas for improvement, concentrate on the value you bring to your team and organization. How do you leverage your strengths at work? 1. 2. 3.
Development Goal/s (choose up to 3)	Describe your development goal/s in terms of observable behavior and skills. Explain why you have chosen this goal. Describe how improvement in this goal will help you perform better and how it will affect your team.
Action Items	Use specific and measurable language to identify 1-3 actions you will take to increase progress in your goal. Action items should have listed milestones or due dates.
Resources	People, technology, systems, or other items needed to achieve this goal.
Outcomes	Describe the impact of achieving this goal for yourself and team.

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