TABLE OF CONTENTS

Introduction ........................................................................................................................................... 2
Mentoring Orientation .......................................................................................................................... 3
Roles and Responsibilities of the Mentor ............................................................................................... 5
Roles and Responsibilities of the Mentee ............................................................................................... 7
Establishing an Effective Mentoring Relationship ............................................................................... 9
The First Meeting: Mentor Planning Worksheet .................................................................................. 10
The First Meeting: Mentee Planning Worksheet .................................................................................. 12
Personal Snapshot .................................................................................................................................. 14
Sample Mentoring Agreement ............................................................................................................. 16
Crafting a Personal Mission Statement ............................................................................................... 18
Writing Goals and Objectives ............................................................................................................... 21

This guide is based on information adapted from the Defence Research and Development Canada
Generic Mentoring Orientation Manual, as well as, MENTOR: the National Mentoring Partnership.

This document is intended for the CSAE Ottawa-Gatineau mentorship program members.
This is not a public document. Please do not distribute this document.
Introduction

Congratulations on participating in CSAE Ottawa-Gatineau’s Mentoring Program. We hope you will find it a productive and rewarding experience.

Mentoring is a privilege and an opportunity. It is foremost a relationship. As such, it is important that the relationship is built first followed by the creation and execution of a plan designed to achieve the goals and meet the expectations of both parties.

Mentoring requires thoughtful planning and preparation for both the mentee and the mentor. Failure to plan effectively can lead to an unproductive mentoring relationship. This leaves both the mentee and the mentor with a dissatisfying experience. This toolkit provides resources that will help both the mentor and mentee with:

- Personal Reflection
- Getting to know strengths and weaknesses
- Establishing goals
- Setting expectations
- Creating a mentoring agreement
Mentoring Orientation

What is Mentoring?

Mentoring is most often defined as a professional relationship in which an experienced person (the mentor) assists another (the mentee) in developing specific skills and knowledge that will enhance the less-experienced person’s professional and personal growth.

The CSAE O-G mentoring program is available to up to 15 pairs per year. In addition to the growth opportunities, it builds relationships across organizations, job functions and levels within the CSAE O-G membership.

A mentor is a trusted friend, usually with more career experience who provides a listening ear, career advice and guidance, feedback and example. Mentors share knowledge and the perspective of their years of experience, nurturing the growth of the mentee as a professional and as a leader.

A mentee is usually described as a more junior professional who has a strong desire to learn, develop, and grow professionally.

Every mentoring relationship is unique, is based upon the personal styles of each partner, the commitments they have agreed to, and the strengths both bring to the relationship. The topics of discussion will largely depend on the mentee’s needs and the issues that the mentor feels are important for the mentee’s long-term professional development.

Common Topics for Discussion in a Mentoring Relationship:

- Personal and professional skills development
- How to build personal recognition and a professional image
- Coping with new or difficult situations
- Career planning
- Balancing health, work and family
- Organizational issues and politics
- Occupational and professional responsibilities
- Leadership
- Ethical decision making and conduct
Roles and Responsibilities of the Mentor

Agreeing to and respecting the confidentiality of the relationship is the key to successful mentoring.

Informational Aspects of the Mentoring Role:
- Identifying and informing the mentee of issues and individuals relevant to his/her goals.
- Providing contacts and advice about networks
- Facilitating the understanding of the political or cultural contexts within associations
- Acting as an experienced and knowledgeable guide to the one or more job functions within an association.
- Agreeing to and respecting the confidentiality of the relationship.

Interpersonal Aspects of the Mentoring Role:
- Developing a full understanding of the mentee’s work situation, learning objectives, goals, and needs.
- Utilizing a full range of skills including listening, coaching, the ability to foster trust, demonstrate enthusiasm and hold confidences.
- Building on the mentee’s strengths, helping to clarify areas of professional growth and development objectives and ways to achieve.
- Respecting mentee’s goals, personality and the dimensions of diversity that shape your relationship
- If it becomes necessary to withdraw from the mentoring relationship, the mentor makes time for closure and possibly offers alternative mentoring arrangements.

Motivational Aspects:
- Assisting in the formation of action plans for achieving goals
- Maintaining time commitments
• Providing constructive and helpful feedback – help the mentee develop self-confidence.
• Encouraging visibility in situations that are relevant to mentee’s goals.
• Providing opportunities for greater independence

In summary....
• Make expectations clear
• Encourage active learning and work with different learning styles
• Show the big picture and break down complex tasks
• Teach by explaining, showing, observing, and giving balanced feedback
• Communicate clearly and listen impeccably
• Promote independent thinking and problem solving by asking astute questions
• Budget adequate time and be accessible to the mentee
• Provide opportunities for independence by providing new responsibilities
• Seek and listen to constructive feedback from the mentee
Roles and Responsibilities of the Mentee

Agreeing to and respecting the confidentiality of the relationship is the first step.

Informational Aspects:
- Clarifying what is expected of the mentor in terms of support
- Researching job opportunities and career possibilities
- Developing a personal career vision
- Drafting career goals and development objectives to be discussed with mentor
- Agree to and respect the confidentiality of the relationship

Interpersonal Aspects:
- Self-motivating, taking responsibility for own development
- Communicating clearly; listening impeccably – demonstrating ability to articulate clear expectations
- Utilizing objectives of mentorship such as self-assessment, development and planning
- Sharing responsibility for making meetings with mentor happen
- Respecting mentor’s time and feedback
- Accepting feedback and sharing in finding answers and solutions for improvement
- Accepting responsibility for the outcome of actions
- Tracking or measuring the progress of learning within the mentoring relationship

Motivational Aspects:
- Initiating and maintaining contact with mentor
- Working with mentor to develop an action plan to achieve goals
- Completing work necessary to achieve goals
Development Plan Guidelines
A mentee should draft a personal development plan to be discussed and perhaps revised in conversations with the mentor. The act of thinking through the plan provides the mentor/mentee pair with a clear place to begin the relationship. Such a plan might include:

- Career goals
- Professional objectives (professional, management, etc.)
- Development objectives (skills, experience, competencies) described in measurable terms
- Action steps to achieve objectives
Establishing an Effective Mentoring Relationship

Relationship is the operative word – as with any relationship it is the responsibility of both parties to create openness and trust. It is crucial for the mentor and the mentee to discuss their hopes and expectations at the outset. This is the time to negotiate elements such as:

- The amount of time each party is willing to devote to the relationship
- Time, place and means for contacts and meetings (e.g. email, telephone, face-to-face, times of day, days of week, etc.)
- Mutual availability
- How differences or conflicts might be handled, should they arise
- How feedback to each other will be managed
- Who is responsible for initiating contact, other than regularly scheduled meetings
- Agreement on how to ensure confidentiality

**JOURNAL NOTES**
The First Meeting: Mentor Planning Worksheet

Before you undertake anything significant in your career that’s new, it can be helpful to take a few minutes to do some planning. Planning is just a way to get clear on what you hope to accomplish — the ‘end’ — and then to lay out some logical steps to help get you there — the ‘means.’ This worksheet walks you through some common sense steps to plan a first meeting with your mentee.

Typically, first meetings allow two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan out some conversation starters — knowing that these are tools if you need them, not a formula.

1. Where might I meet with my mentee where we both would feel comfortable? List a few ideas below.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. What are some things I could tell my mentee about myself that would help us get to know each other a little bit? What about me and my career story might be interesting and relevant to them?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
3. What are some questions I could ask my mentee to get to know him/her a little bit without prying? (Write some possible open-ended questions below. Note: these are questions that cannot be answered with a ‘yes’ or ‘no.’)

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

4. What do I want out of the mentoring relationship — what are my hopes?

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

5. How can I find out what my mentee hopes to get out of the relationship — what questions might I ask?

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

We recommend you look over your answers to this planning sheet shortly before your first meeting with your mentee. You might even bring it along to offer it as a bit of a roadmap for you both to follow. Use your judgment — but remember to at least look your responses over before the meeting — this will make you more comfortable and relaxed.
The First Meeting:  **Mentee Planning Worksheet**

Before you undertake anything significant in your career that’s new, it can be helpful to take a few minutes to do some planning. Planning is just a way to get clear on what you hope to accomplish — the ‘end’ — and then to lay out some logical steps to help get you there — the ‘means.’ This worksheet walks you through some common sense steps to plan a first meeting with your mentor.

When you first meet another person, usually you will want to get to know a little bit about each other, start to get comfortable and attach a face to a name. To get off to a good start, you need to think about a place to meet where you would both feel comfortable, and plan out some things you might want to ask or say — for starters.

1. Where could I meet with my mentor where we both would feel comfortable — where we can sit and talk? List a few ideas below.

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

2. What are some things I could tell my mentor about myself that would help us get to know each other a little bit? What about me and my career story might be interesting to my mentor? What should s/he know about me in order to be a good mentor?

____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
3. What are some questions I could ask my mentor to get to know him/her a little bit without prying? Write some possible open-ended questions below (Note: these are questions that your mentor cannot answer with a ‘yes’ or ‘no.’)

__________________________________________
__________________________________________
__________________________________________

4. Why do I want to have a mentor?

__________________________________________
__________________________________________
__________________________________________

5. How can I find out why my mentor wants to mentor me? Write out some questions to ask.

__________________________________________
__________________________________________
__________________________________________

You will want to look over your answers to this planning sheet just before your first meeting with your mentor. You might even bring it along when you do meet. Remember to at least look over what you’ve written before the meeting — this will make you more comfortable and relaxed.
**Personal Snapshot**

To be completed by the mentee

As of ___/___/___ (fill in date):

Every once in a while it’s a good idea to step back from your day-to-day career and ask yourself — where am I? How am I doing? This activity helps you to do just that — and to get feedback from your mentor on how s/he sees you too.

Take time to complete this snapshot. Then share your answers with your mentor. Remember: the purpose of this is to help you get a real picture of where you are — if you’re not honest, you’ll end up with a picture of someone else, not yourself, and that won’t help you become who you want to be!

Keeping in mind the goals you’ve begun to explore, answer these questions as honestly as you can:

1. What are my top 5 strengths as a person — the top 5 things about myself I feel good about and am proud of?

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

2. What are my top 5 weaknesses as a person — the 5 things I most want to work on or improve about myself?

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
3. What are the top 5 opportunities available to me at this moment — things I could do or act on or take advantage of that would help me develop and reach my potential?

4. What are the top 5 threats I’m facing right now — things “out there” in the real world that could keep me from achieving my aspirations?

You’ve just completed a “SWOT Analysis” — one step in strategic planning, which is similar to the kinds of planning you do with your mentor. To be useful you need to use your answers to come up with a plan of action so you can make best use of your strengths and opportunities and overcome your weaknesses and threats. Use the question below to help start that planning process.

5. What are the 5 most important things I can do over the next 6 months to build on my strengths and overcome my challenges?
Sample Mentoring Agreement

The conversation between mentor and mentee to discuss the nature of the relationship is crucial in order to ensure that participants have similar expectations about their relationship.

Once the details have been negotiated a mentoring agreement forms the framework for the relationship. It is useful to have a written version in order to ensure mutual understanding and for future reference. The format can be individually constructed, and should, at a minimum, include the following:
MENTORING AGREEMENT

We are voluntarily entering into a mentoring relationship, which we expect to benefit both of us and the organization. For clarity and mutual understanding we are outlining the following features of our relationship:

- Unless renegotiated at a later date, we expect the relationship to last until ____________________________

- We will ensure confidentiality by:
  ________________________________________________________________
  ________________________________________________________________

- Specific role of mentor (observe & provide feedback, coach, recommend developmental activities, facilitate learning, suggest resources, etc)
  ________________________________________________________________
  ________________________________________________________________

- We plan to meet or make contact at these times and places
  ________________________________________________________________
  ________________________________________________________________

- Approximate amount of time to be invested by mentor ________________
  and by mentee ________________

- Specific skill areas to be addressed by mutual agreement
  ________________________________________________________________
  ________________________________________________________________

We agree that anything discussed between us will remain confidential unless specific permission is given for it to be shared.

We agree to a no-fault conclusion, if at any time or for any reason one or both of us desires to discontinue the relationship.

Additional Comments
  ________________________________________________________________
  ________________________________________________________________

Mentor ____________________  Mentee ____________________
Date _______________  Date _______________
Crafting a Personal Mission Statement

To be completed by the mentee, possibly in collaboration with the mentor.

A personal mission statement explains who you are and want to be, and what you stand for. You can use it to guide you when making choices and decisions, large and small, by asking yourself — ‘does it help me become who I want to be?’ A personal mission statement also helps you explain who you are to others.

A personal mission statement should answer 3 questions:

- What is my career about — what is my career’s purpose?
- What do I stand for — what are my values?
- What accomplishments am I working toward that will help me fulfill my career’s purpose in a manner consistent with my values?

Step 1: Clarifying purpose and values

A. Write a list of at least 10 talents you have.

B. What excites you about your career? About the world? What concerns you about your career? About the world?
C. What would a really good day be like for you? Where would you be? What would you do? Imagine anything — it doesn’t have to be true.

D. Imagine that today is your 50th birthday, and a reporter is writing a story about what you have done in your life to date. What would you hope your friends, the people you work with, family members would say about you to this reporter? What difference would you hope you had made in their lives? How do you want to be remembered?

E. Imagine yourself at 100 years old, surrounded by your loved ones — talking with them in a comfortable, relaxed setting. These people have gathered to learn from you and your wisdom. What would you tell them is important in career? What really matters, looking back on your career?
Step 2: Drafting a Mission Statement

Look over what you’ve written during Step 1. Then look again at the 3 questions a mission statement should answer:

- What is my career about — what is my career’s purpose?
- What do I stand for — what are my values?
- What accomplishments am I working toward that will help me fulfill my career’s purpose in a manner consistent with my values?

Write a rough draft of your personal mission statement. It should be short but still tell who you are. When you read your personal mission statement, you should feel something, like “yes, that’s who I really am!”

Keep your draft personal mission statement with you and look at it several times during the day — see you how it makes you feel. You may want to bring it to the next several meetings with your mentor to talk about it and see if you want to change it.
WRITING GOALS AND OBJECTIVES
To be completed by the mentee

In order to create the kind of career you want, it helps to have a clear picture of where you’re headed — your personal mission. It’s equally important to make a plan on how to get there — how to make your aspirations come true, one day at a time.

To help you do that it is a good idea to learn how to set goals and objectives for yourself. Your goals are the things you want to do over the next several years. Your objectives are the smaller steps you’re going to take — tomorrow, next week, next month — to get there.

By writing down goals and objectives for yourself you are taking a big step toward making them happen. The next step will be to actually do these things — and keep a record. This is something you and your mentor can work on together over time.

**Writing Goals**
Here are some of the areas in which you might be interested:

- Education — what are my goals for further education?
- Relationships — What do I want my peer/manager or business relationships to be like?
- Work — what direction do I want to go in in terms of my future career? New role, same role – better, promotion, lateral move, intra or inter departmental
- Fitness/Health — if I am successful what will my health and fitness be like several years down the road?
- Work/Life – what balance am I seeking?
- Other --

State goals for each:
• Education

______________________________________________________

• Relationships

______________________________________________________

• Spiritual

______________________________________________________

• Fitness/Health

______________________________________________________

• Work

______________________________________________________

• Work/Life

______________________________________________________

• Other

______________________________________________________
**Writing Objectives**

Objectives are the smaller steps you take to make progress toward your goal. To be useful, objectives need to answer the question “what will change, by how much, by when?”. Usually objectives work best when they are written for the next few months to a year. It’s hard to know what will change beyond that time frame, so it’s hard to set realistic objectives several years out.

Take some time to write the goals you just developed in the space below, and then write several objectives for each goal. You can do this with your mentor or on your own and then go over them together.

Here’s a tip on how to test if your objectives are solid — ask yourself, are they “SMART?” Smart stands for:

- **Specific** — do I know precisely what has to happen?
- **Measurable** — how will I know if I’ve achieved this objective?
- **Attainable** — is it realistic or do-able?
- **Result-oriented** — will it really move me toward my goal?
- **Time-limited** — does it have a due date?

If your goals are SMART, they’re solid — now go start doing them!
My Goals & Objectives

Goal:
__________________________________________________________

Objectives:
•
•
•

Goal:
__________________________________________________________

Objectives:
•
•
•

Goal:
__________________________________________________________

Objectives:
•
•
•

Goal:
__________________________________________________________

Objectives:
•
•
•
Goal:

Objectives:
•
•
•

Goal:

Objectives:
•
•
•

Goal:

Objectives:
•
•
•