



CASE MENTORSHIP HANDBOOK
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2020 – Contributors:

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CASE Purpose, Framework and Expectations

Purpose:

CASE will provide a Mentorship Handbook for all 7 CASE Departments to use in their job-alike positions. The goal will be on building trusting relationships between the mentor, mentee that focuses on building leadership capacity.

Suggested Framework for Departments:

- Each department will receive the CASE Mentorship Handbook.
- Departments will be responsible for the implementation of the department's mentorship program.

Suggested Expectations for Departments:

- Use of the CASE Mentorship Handbook in the development of the department's program.
- All 7 departments will use the same "Mentorship" definition as defined in this handbook.
- Recommended that each department have "Ad Hoc" committee for their department Mentorship Program.
- Departments will select mentors by the suggested protocol:
 - Develop a questionnaire/application for mentors that are in alignment to the department's needs.
 - Develop a department committee to review nominated Mentors.
- Suggested that Mentor and Mentee be in the same regional area and have similar district/school responsibilities.
- Use the enclosed Mentee questionnaire for goal setting to be used for the planning of the program.
- CASE will help advertise each department's mentorship program.
- Suggested that each department develop a questionnaire for potential mentees.
- CASE recommends that each department's program is structured in a 1-to-1 Mentor to Mentee format.



Definitions

Definition of Mentorship:

A mentor is an insider in a system, an expert in a field, who supports a novice. A mentor shows a novice the ropes, the tricks of the trade, and helps the newcomer get through a career transition. A mentor passes on knowledge, experience, and helps a mentee make connections to others. *Elena Augilar*

What Mentorship is NOT:

A coach is a teacher, a facilitator of someone else's learning. In order to effectively guide the learning of another adult, a coach needs an extensive toolset. The coach doesn't need to be an expert in precisely the same field as the person they're coaching (i.e.: a former 6th grade teacher can effectively coach a new 1st grade teacher or a high school English teacher can effectively coach a middle school math teacher who is struggling with classroom management). However, the coach does need to have expertise in the field of teaching (someone who has never taught cannot effectively coach a teacher).

The job of a coach is wider, deeper and more extensive than the role of a mentor, and coaches usually receive far more training in order to become a coach (or at least they should). A new teacher or leader can benefit tremendously from having both a coach and a mentor.

Today, mentoring is a process in which an experienced individual helps another person develop his or her goals and skills through a series of time-limited, confidential, one-on-one conversations and other learning activities. Mentors also draw benefits from the mentoring relationship. As a mentor, you will have the opportunity to share your wisdom and experiences, evolve your own thinking, develop a new relationship, and deepen your skills as a mentor.



Key Mentoring Skills

The key mentoring skills discussed here are adapted from the work of Linda Phillips-Jones, Ph.D.

KEY MENTORING SKILLS
<i>Listening Actively</i>
<i>Building Trust</i>
<i>Determining Goals and Building Capacity</i>
<i>Encouraging & Inspiring</i>

You will likely recognize the skills outlined here and may have experience employing them successfully in other relationships. As you progress through the mentoring relationship, try to employ these skills whenever possible.

1. *Listening Actively*

Listening actively is the most basic skill you will use throughout your relationship. Active listening not only establishes rapport but creates a positive, accepting environment that permits open communication. By listening actively, you will ascertain your mentees interests and needs. Examples include the following:

- Show interest in what he or she is saying, and reflect back important aspects of what he or she has said to show that you've understood;
- Use body language (such as making eye contact) that shows you are paying attention to what he or she is saying; and
- When utilizing e-mail, answer within 24 hours if possible, and be sure your message is responsive to his or her original message.
- Reserve discussing your own experiences or giving advice until after your mentee has had a chance to thoroughly explain his or her issue, question, or concern.



2. *Building Trust*

Trust is built over time. You will increase trust by keeping your conversations and other communications with your mentee confidential, honoring your scheduled meetings and calls, consistently showing interest and support, and by being honest with your mentee.

3. *Determining Goals and Building Capacity*

As a role model, you should have your own career and personal goals and share these, when appropriate, with your mentee. It is also likely that he or she will ask you how you set and achieved your own goals. In addition, you can help your mentee identify and achieve his or her career and personal goals.

You will develop your mentee's capacity for learning and achieving his or her goals by doing the following:

- Assisting him or her with finding resources such as people, books, articles, tools and web-based information;
- Imparting knowledge and skills by explaining, giving useful examples, demonstrating processes, and asking thought-provoking questions;
- Helping him or her gain broader perspectives of his or her responsibilities and organization; and
- Discussing actions you've taken in your career and explaining your rationale.

4. *Encouraging and Inspiring*

According to Dr. Phillips-Jones' research, giving encouragement is the mentoring skill most valued by mentees. There are many ways to encourage your mentee.

Try some of these:

- Comment favorably on his or her accomplishments;
- Communicate your belief in his or her capacity to grow personally and professionally and reach his or her goals; and
- Respond to his or her frustrations and challenges with words of support, understanding, encouragement and praise. (Just knowing that someone else has been there can be tremendously helpful.)



You can also inspire your mentee to excel. Examples include the following:

- Describe experiences, mistakes, and successes you or others have encountered on the road to achieving your goals;
- Talk with him or her about people and events that have inspired and motivated you; and
- Introduce him or her to your colleagues who can be additional useful contacts or inspiring models.

Reflecting on your mentoring practice, noting use of the key mentoring skills, observing progress made in the relationship, and requesting feedback from your mentee are excellent ways to assess whether you are employing these skills.



Stages of Formal Mentoring Relationships

Like most relationships, mentoring relationships progress through stages. Your formal mentoring relationship will likely reflect four developmental stages with each stage forming an inherent part of the next:

- I. Building the Relationship
- II. Exchanging Information and Setting Goals
- III. Working Towards Goals/Deepening the Engagement
- IV. Ending the Formal Mentoring Relationship and Planning for the Future

There is no strict formula for determining the length of each stage. In a year-long relationship, for example, Stages I and II typically unfold during the first three to four months of the relationship. Typically, the relationship winds down in months 11 and 12. Options for continuing the relationship in a less formal way are addressed in Stage IV.

The sections that follow discuss practical activities for progressing successfully through each stage.

Stage I: Building the Relationship

During this phase, you will get to know each other and begin to establish trust.

During your first meeting (ideally face-to-face), discuss your backgrounds, experiences, interests, and expectations. You will also make agreements about confidentiality and the frequency of contact.

During this first stage, it is important to establish a schedule for communicating regularly, whether in-person, by phone, or e-mail.



There are a number of questions you may want to ask your mentee during your second meeting:

- Tell me a little more about yourself, your skills, your organization or community, the political environment, some key challenges you are facing, etc. (Begin by reflecting back a few of the key experiences and interests he or she expressed during your first meeting.)
- How have you benefited from other mentoring relationships?
- What are some of your preliminary goals for our mentoring relationship?

Stage II: Exchanging Information and Setting Goals

During Stage II, you will exchange more information and set goals. Your relationship and trust will deepen. As the mentoring relationship unfolds, be attentive to practicing active listening and consistently expressing encouragement.

Helping Your Mentee Set Goals:

By exchanging information, you will gain insight into the goals your mentee hopes to achieve through the mentoring relationship. Mentors have provided their mentees with input and support on a great variety of issues and challenges. For example, your mentee may want to improve his or her skills in a particular area. Alternatively, he or she may need your guidance on a major decision.

Goals are helpful because they help the mentee see beyond the day-to-day demands of his or her position and help him or her gain clarity on how to get the most out of the mentoring relationship. Encourage your mentee to discuss his or her goals with you. Suggest that he or she complete the Goal Form (Appendix II) and share it with you.

Coach your mentee to refer back to his or her goals periodically as a way of re- focusing on goals and measuring progress. Referring to the goals regularly is also a good way for you to know if you are helping him or her achieve them.



Stage III: Working Towards Goals/Deepening the Engagement

During Stage III, which is typically the longest, you will help your mentee work towards achieving his or her goals through conversations, sharing written materials, trying various learning and development activities, and introducing him or her to other colleagues. This is a rich phase marked by openness and trust, meaningful discussion, and application of new insights and approaches. Your mentee needs your ongoing encouragement at this stage. You may also feel comfortable enough to challenge him or her to think in new ways or approach a problem differently.

This is a good point in the journey to reflect on progress toward goals and on the relationship itself. Consider discussing the following:

- What are the benefits of the relationship up to this point? How am I helping you (mentee) achieve your goals?
- What changes do you see in yourself and in the way you approach your work as a result of the mentoring relationship?
- What kinds of adjustments or changes, if any, are needed in your goals or in our relationship?

This is also the stage during which energy in the relationship can wane! Sometimes, the mentee will feel concerned that he or she is burdening you. Other responsibilities will often compete with his or her commitment to the mentoring relationship. If you haven't heard from your mentee, check in with him or her. Take the lead if necessary. Also take stock of your own time and energy. Is the partnership working well for you? Do you need to make some adjustments?

This is a highly rewarding phase of the relationship, but challenges may arise. Here are some examples of challenges other mentors and mentees have faced and resolved.



- **Time and energy.** The most common challenge by far is finding sufficient time to do all you want to do in the partnership. Despite good intentions, other priorities interfere for both of you.

Solution: *Think small rather than large, especially in the beginning. Avoid promising more time than you can deliver. Check with your mentee to be certain you are both comfortable with the time you are spending and with the learning that is occurring.*

- **Building trust quickly.** With only a few hours of contact each month, it is not easy to build the kind of trust you both would like.

Solution: *Other mentors have successfully used several strategies, such as the following: Listen very carefully, and remember what your mentee has said in the past. Demonstrate your credibility. Keep your promises and commitments -- if any need to be changed, let your mentee know immediately and reschedule or renegotiate them. Admit some errors made and lessons learned. Avoid talking negatively about others. Above all, keep the confidences your mentee shares with you.*

- **Not being the “expert” on all your mentee’s needs.** Many mentors find it difficult when they do not have all the answers.

Solution: *Explain your role as “learning facilitator” early in your relationship. Tell your mentee that you will not have all the answers, and you are looking forward to learning together as well as seeking help from others who are more expert on different topics.*

- **Being sensitive to differences.** Particularly in the beginning, it is tempting to assume that both of you are the same. In fact, you will share experiences. Explore and learn from your differences as well.

Solution: *In addition to discovering all your similarities, work carefully to identify the differences between you and your mentee. For example, how do the specifics of his or her position differ from the role(s) you’ve played? What is occurring now for him or her that you did not face? If you are of different generations/ages, genders, races, cultural groups, or professional backgrounds, what different experiences have you both had? Assume a learning mode, and invite discussion about all of these topics. As Stephen Covey reminds us in **Seven Habits of Highly Effective People**, “Seek first to understand.”*



Stage IV: Ending the Formal Mentoring Relationship and Planning for the Future

During this stage, planning for the mentee's continued success is balanced with bringing the formal mentoring relationship to a close. Work with your mentee to define the types of support he or she may need in the future. You may want to connect him or her with additional colleagues who can provide benefits other than those provided by you. This is also a good time to explore your mentee's own interest in one day mentoring someone.

Adjournment brings closure to the journey. Your final discussion should be dedicated to the following:

- Reflecting on accomplishments, challenges, and progress towards goals;
 - What will your mentee remember most about the relationship?
 - What challenges lie ahead for him or her?
- Exploring other types of support he or she may still need;
- Discussing whether the relationship will continue informally and how you will implement that; and
- Expressing thanks and best wishes!



Mentoring Best Practices

- Think of yourself as a “learning facilitator” rather than the person with all the answers. Help your mentee find people and other resources that go beyond your experience and wisdom on a topic.
- Emphasize questions over advice giving. Use probes that help your mentee think more broadly and deeply. If he or she talks only about facts, ask about feelings. If he or she focuses on feelings, ask him or her to review the facts. If he or she seems stuck in an immediate crisis, help him or her see the big picture.
- When requested, share your own experiences, lessons learned, and advice. Emphasize how your experiences could be different from his or her experiences and are merely examples. Limit your urge to solve the problem for him or her.
- Resist the temptation to control the relationship and steer its outcomes; your mentee is responsible for his or her own growth.
- Help your mentee see alternative interpretations and approaches.
- Build your mentee’s confidence through supportive feedback.
- Encourage, inspire, and challenge your mentee to achieve his or her goals.
- Help your mentee reflect on successful strategies he or she has used in the past that could apply to new challenges.
- Be spontaneous now and then. Beyond your planned conversations, call or e-mail “out of the blue” just to leave an encouraging word or piece of new information.
- Reflect on your mentoring practice. Request feedback.
- Enjoy the privilege of mentoring. Know that your efforts will likely have a significant impact on your mentee’s development as well as your own.



MENTORING GOAL FORM*
(To be completed by the mentee.)

Name: _____ Date: _____
School District/School: _____ Position: _____
Date: _____

What do you want to achieve through engaging in the mentoring relationship? Complete this form and discuss your goals with your mentor. Examine your goals periodically, and discuss progress made.

Goal #1:

Benefits to You:

Benefits to Your school and/or school district:

Potential Barriers to Success:

Resources/Support Needed to Achieve Goal:

How Progress Will Be Measured:

* Adapted from Leadership Enterprises (www.leadershipenterprises.com)



SAMPLE MENTEE FEEDBACK FORM

Mentee Evaluation Form (Completed by the Mentor)

Please provide information and insight regarding the TLSAMP mentoring program by indicating a rating value for the following questions related to the past semester's activities and the nature of the mentoring process.

Mentor's Name: _____ Major: _____

Mentee's Name: _____ Major: _____
(Optional)

Semester: _____

Questions	Strongly Disagree -1	Disagree-2	Neutral-3	Agree-4	Strongly Agree-5
My mentee was accessible and available.					
My mentee communicated regularly with me.					
My mentee was concerned about academic problems and worked to remove all deficiencies.					
My mentee contacted me regularly if there was a need to improve course work performance.					
My mentee demonstrated a reasonable interest/concern towards me in my quest to offer assistance.					
My mentee's behavior and attitude generally professional and courteous.					
My mentee learned at least one important lesson about college life, or life in general from me.					
I recommend my mentee for future mentoring programs.					
Overall, my mentee participated in most mentoring activities.					
I anticipate an extended future relationship with my mentee.					

Mentor Signature: _____ Date: _____



Additional Resources

Phillips-Jones, L. (2001) Personal communication. Adapted from CCC/The Mentoring Group's Mentor and Mentee training materials.

Aguilar, Elena (2013) *The Art of Coaching: Effective Strategies for School Transformation*.

Phillips-Jones, Linda, Ph.D, Licensed psychologist, UCLA: *The Process and Skills of Mentoring*.

Michigan Association of School Administrators, *Mentoring Coaching Handbook*

<https://www.rackham.umich.edu/downloads/more-mentoring-guide-for-mentors.pdf>

https://newteachercenter.org/wp-content/uploads/NTC-High-Quality-Mentoring_Instructional-Coaching-Practices.pdf

https://www.mentoring.org/new-site/wp-content/uploads/2016/03/Success-Mentors-School-Checklist.FINAL_.pdf