

MENTORING PROGRAM TOOLKIT

Robert Wood Johnson Foundation
New Careers in Nursing



3RD EDITION



Robert Wood Johnson Foundation



American Association
of Colleges of Nursing

MENTORSHIP: A STUDENT SUCCESS STRATEGY
MENTORING PROGRAM TOOLKIT
THIRD EDITION
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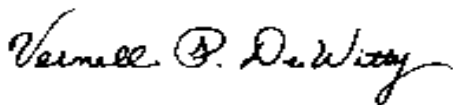
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PREFACE

Mentorship: A Student Success Strategy is a revision of the Robert Wood Johnson Foundation New Careers in Nursing Scholarship Program's (NCIN) mentoring program, originally designed to assist schools of nursing in developing effective NCIN scholar mentoring at their respective schools. This guidebook has been revised to update and incorporate current research and evidence regarding mentorship of students from diverse backgrounds. Mentorship, as defined by Crisp, Baker, Griffin, Lunsford and Pifer (2017), is a relationship in which a more experienced or more knowledgeable person helps to guide a less experienced or less knowledgeable person. Mentorship experience and relationship structure affect the amount of psychosocial support, career guidance, role modeling, and communication that occurs in the relationship (Crisp et al., 2005).

Retention and graduation rates of racial and ethnic minority students continue to be a major concern for higher education researchers, policy makers, and practitioners. Berkner, He, and Cataldi (2002) reported that over one half of the Black and Latino/a students who enter a four-year college will fail to complete a bachelor's degree within six years of matriculation, a rate much lower than that exhibited by their White counterparts. Because of the low rates of completion and the negative consequences that accompany them, educators must make efforts to increase persistence and degree completion among this population of students. Mentoring has long been considered a retention and success strategy for students and is related to positive academic outcomes.

Early research studies by Tinto's theory (1993) explained that a student's decision to remain enrolled in college is a process of interactions between the student and the social and academic system of their college. Current findings by Nora and Crisp (2009) suggest that additional constructs may outweigh the influence of social and academic integration for minority students. This mentoring guidebook is designed to reflect current research findings in developing and implementing an effective mentoring experience that may benefit students from diverse backgrounds and improve academic success and persistence.



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Robert Wood Johnson Foundation New Careers in Nursing Scholarship Program

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PURPOSE AND CONCEPTUAL MODEL

The Mentoring Program Toolkit is designed to guide and assist schools of nursing in developing and implementing mentorship programs that offer structured support and opportunities that may increase student success and retention. Mentoring programs have been associated with supporting student development and success, increasing degree completion rates, and reducing inequities in outcomes for underrepresented groups.

This toolkit will complement the orientation, leadership development, and other student success strategies offered by the school.

Emerging bodies of frameworks have been proposed for the study of mentoring. The framework selected for the development of this toolkit emanates from the framework of Nora and Crisp (2010, 2011) with a focus on the forms of assistance to which students gain access through mentoring relationships (Crisp, 2010). This framework is specific to higher education and the needs and goals of students. Based on a synthesis of existing research and their own empirical work, Crisp and Cruz (2009) propose four constructs of undergraduate mentoring relationships:

- Psychosocial and emotional support;
- Degree and career support;
- Academic subject knowledge support; and
- The existence of a role model.

Mentoring has long been considered a retention strategy for students. Research suggests that mentoring relationships are positively related to academic outcomes, such as persistence and grades, and as a strategy to support social justice and the development of underrepresented and disadvantaged students (Crisp, 2011).

Mentoring has also been recognized as a learning engagement experience that encompasses growth for both the mentor and the mentee. This experience has a predictable structure that can be described in phases: preparing, negotiating, enabling growth, and coming to closure.

OBJECTIVES

The objectives of the Mentoring Program Toolkit are to:

- Provide a structured approach for developing a mentorship program.
- Provide information and guidance on implementing mentoring support for nursing students during their attendance in programs of nursing studies.
- Provide instructional options and a guidebook for mentoring activities that can be adapted to a wide variety of nursing schools and programs.
- Provide support and structured opportunities to increase student success and retention as they enter nursing programs and transition into the nursing profession.

DEFINITION

Although definitions of mentoring have varied across studies and programs, there appear to be consensus across four central characteristics of mentoring programs (Crisp and Cruz, 2009):

1. Mentoring relationships are focused on the growth and development of students and can be constructed in various forms.
2. Mentoring experiences may include broad forms of support that include professional, career, and emotional support.
3. Mentoring relationships are personal and reciprocal.
4. Relative to their students, mentors have more experience, influence, or achievement within the educational environment.

For purposes of this toolkit, mentoring is defined as a formalized process whereby a more knowledgeable and experienced person actuates a supportive role of overseeing and encouraging reflection and learning within a less experienced and knowledgeable person, so as to facilitate that person's career and personal development.

The mentor and mentee agree to a partnership where they will work collaboratively toward achievement of mutually defined goals that will develop the mentee's skills, abilities, knowledge, and/or thinking.

FORMAT

The Mentoring Program Toolkit is formatted as a two-part mentoring guide. The first part consists of the toolkit itself, which will aid faculty in developing or fine-tuning a mentoring program for students. The second part is a complete Mentoring Guidebook that you can provide to mentors and student mentees as a guide for their mentoring relationship.

HOW TO USE THIS TOOLKIT

The toolkit begins with an assessment to determine your nursing program's current mentoring support status. A sample Basic Mentoring Plan follows, which contains foundational steps integral to students' success and retention as they advance through your program. A mentoring plan should include, at a minimum, the following components:

- Learner-centered mentoring model
- Definition of mentoring
- Mentoring process
- Information about establishing the mentoring relationship
- Goal setting

- Framework for mentoring meetings
- Means for reflecting and evaluating the mentoring relationship
- Information about closing the mentoring relationship

You are encouraged to use our Basic Mentoring Program as a starting point, customizing as necessary to add additional material for issues unique to your school.

DESIGNING A MENTORING PROGRAM

Now, on to developing a Mentoring Program! Start with the Mentoring Program Assessment and build on what you know about your school.

Once you have completed the Mentoring Program Assessment, you will have a sense of the level of mentoring support you currently provide, and the available resources that will shape the Mentoring Program that you can provide for the students. Your responses on the Mentoring Program Assessment will indicate how you might use the Basic Mentoring Program included in this toolkit.

Use the Basic Mentoring Program to verify what you need to offer, or use it as a starting point if you have no mentoring program. The Basic Mentoring Program can supplement an existing program that might have gaps, or to fine-tune a program that is missing only a few of the required components.

MENTORING PROGRAM ASSESSMENT

This assessment is intended to provide you with a quick understanding of your school's current level of student mentoring support. Results will identify areas where support is needed and indicate how you can use the Basic Mentoring Program to convert "no" responses to a "yes."

Because an organization's level of mentoring support can shift based on changes to school administration, faculty, and students, annual assessments of the mentoring program are helpful in determining if the scope continues to be appropriate—or, if it needs to be adjusted.

A. Mentoring Program Activities: Mentoring is a support mechanism that greatly enhances a student's success in a variety of learning environments.	Yes	No
1. Do you have an ongoing mentoring program for your students?		
2. Do you have a specific mentoring model that you follow?		
3. Do you have an individual or individuals designated as a mentor program director/liaison/program manager that mentors and mentees can go to with questions?		

4. Do you have a process for selecting or recruiting mentors?		
5. Do you have a process for matching mentors and mentees?		
6. Do you provide your mentors and mentees with an understanding of the mentoring program and the relationship they are creating?		
7. Do you require both your mentors and mentees to prepare for the mentoring relationship?		
8. Do you specifically provide time for the mentors and mentees to meet?		
9. Do you have specific or stated requirements for the content of activities conducted during the mentoring meetings?		
10. Do you require the mentors and mentees to establish learning goals to be achieved during the mentoring relationship?		
11. Do you evaluate the mentoring program and the mentors from time to time?		
12. Do you have a means to resolve mentor relationship difficulties?		
13. Do you have a means to change mentors if that need arises?		
14. Do you provide the mentors and mentees with a format for closing the mentoring relationship?		
15. Do you have a closing process built into your mentoring program once the mentoring program ends?		
B. Mentoring Program Support: Ongoing programmatic support is critical so that the mentoring program can support students' learning experience and success in the transition from nursing student to nursing leader.	Yes	No
1. Do you conduct periodic check-ins or evaluations of the mentoring process to determine if the relationship is working for both the mentor and mentee?		
2. Do you have a process for dealing with issues that may arise in the mentoring relationship?		
3. Do you have an individual or individuals designated to help mentors and mentees work out issues that may arise during the mentoring relationship?		
4. Do you have a pool of mentors to draw from should you need to change mentors or replace a mentor who has left the program during the mentoring relationship due to an illness or other unavoidable event?		

5. Do you have a closing process for the mentors and mentees once the mentoring program ends?		
6. Do you provide the mentors and mentees with networking opportunities?		
C. Post Program Support: Once a student graduates from school, continued mentoring support often makes the difference for retention in the field.	Yes	No
1. Do you have an active alumni association or network that interacts professionally and/or socially with your graduates?		
2. Do you offer any graduate-alumni mentoring programs?		
3. Do you have a mentor program that matches students with alumni mentors from the nursing profession and/or nursing specialties?		

Once you have completed your assessment, review the recommended Basic Mentoring Program and begin to make modifications to your mentoring program as needed. Plan a program that will offer all the recommended core components.

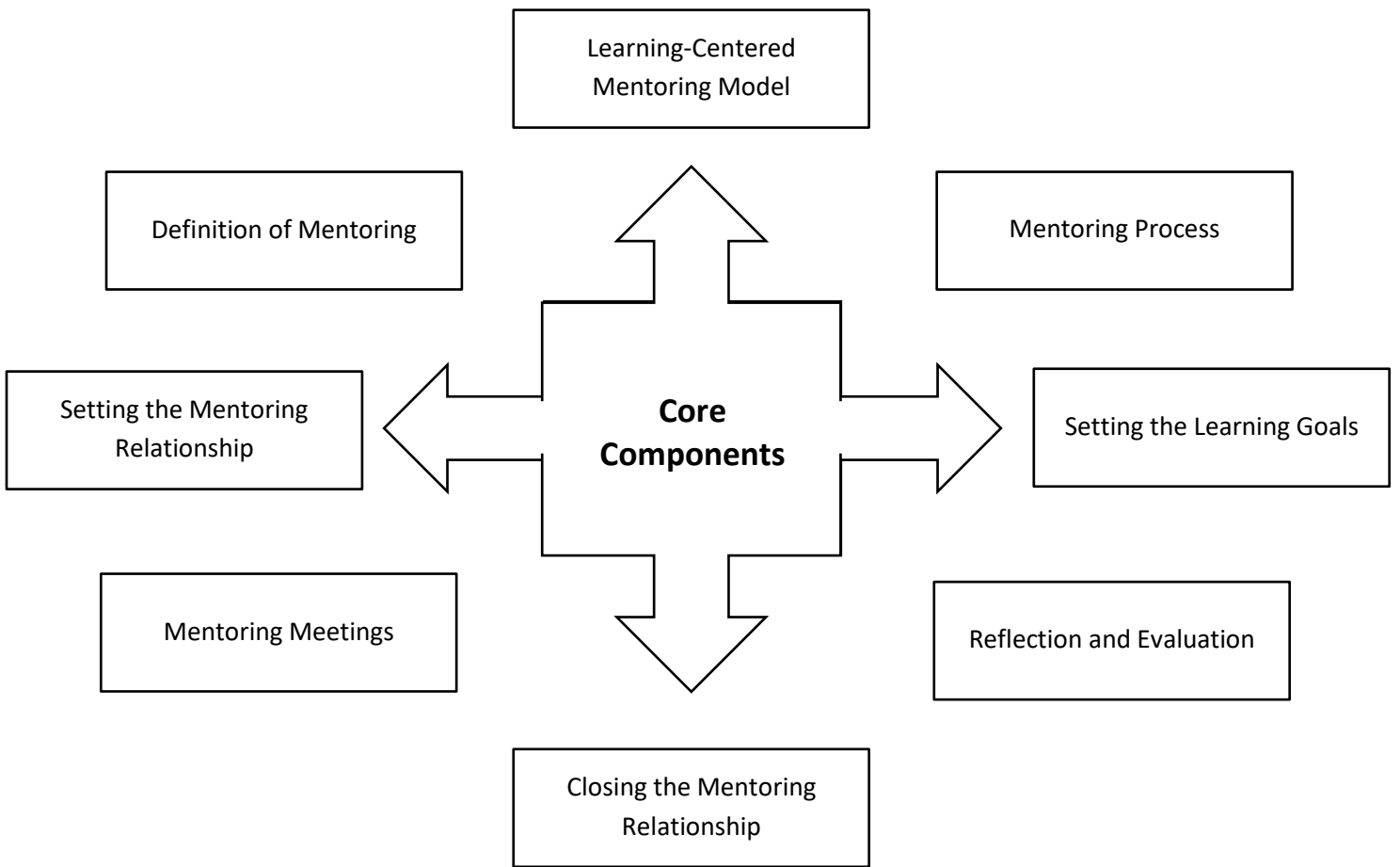
Adapted from Dr. Antonia Villarruel's Organizational Self-Assessment

MENTORING PROGRAM DESIGN PROCESS

Mentoring Program Assessment
Assess the level of mentoring support your school provides to determine the scope of your mentoring program.



MENTORING PROGRAM DESIGN
The results of your assessment will guide you as to how to modify your mentoring activities. Review the recommended mentoring program and begin to make modifications to your mentoring program as needed or start with the Basic Mentoring Program. Plan a program that will offer all the recommended core components.



Based on your Mentoring Program Assessment results, you can determine if you need to begin with the Basic Mentoring Program, supplement your existing plan with more components or fine-tune your existing mentoring program to provide all the recommended core components.

BASIC MENTORING PROGRAM

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Should you decide that you'd like to offer more than the basic program, the following are excellent resources for expanding the mentoring experience (and which served as the foundation for this basic mentoring program):

- *The Mentor's Guide: Facilitating Effective Learning Relationships* (Lois J. Zachary, 2011)
- *The Mentee's Guide: Making Mentoring Work for You* (Lois J. Zachary, 2012)

PART I: MENTOR RECRUITMENT

Section One: Who Can Be a Mentor?

Students who attend your nursing school will come from diverse cultures, family histories, and economic situations. They will all bring a host of attributes, life experiences, and knowledge that they will want and need to connect to what they are learning in your program. A growing body of evidence suggests that faculty members, staff members, graduate students, community nurse leaders, and peers are all important to college student success and may serve as mentors.

- **Faculty and Academic Advisors:** Faculty and academic advisors are critical to the student experience and are responsible for helping students navigate institutional, departmental, and programmatic requirements. Faculty can engage students through supervised research.
- **Staff Members:** Staff members also assist with student adjustment and advancement toward degree attainment. Counseling and student services are important to the academic experience.
- **Graduate Students:** Graduate students often support the work of faculty and may be available to meet with students for support, examination reviews, etc.
- **Community Leaders:** Practice partners who support the advancement of students may also serve as mentors, especially as students prepare to transition into the workforce.
- **Peers:** Peer relationships are very important to students and a vital source of academic and social support. This may be particularly important to underrepresented and first-generation college students. Research evidence suggests that peers enrich the learning process for students.

Mentor Recruitment Action Items:

- A. Mentor Recruitment Process
- B. Identify Potential Mentors
- C. Select Mentors
- D. Meet with Mentors

Section Two: Mentor Recruitment

A. Mentor Recruitment Process

The mentor recruitment process requires some careful thought. It is important to make sure you find people who fit your expectations. In order to make the best choices, follow these important steps:

1. Identify your goals.	<ul style="list-style-type: none"> Consider why you want mentors for the students. Define what you hope to achieve as the end result of the mentoring for the students.
2. Create a list of criteria.	<ul style="list-style-type: none"> Identify the qualities you want in a mentor. (<i>See Selecting Mentors, page 13</i>)
3. Determine qualities that are “must haves.” (Musts)	<ul style="list-style-type: none"> Select those requirements that are non-negotiable from your list.
4. Rank the remaining criteria. (Wants)	<ul style="list-style-type: none"> Rank the order of the remaining criteria in order of importance to you.
5. List possible options.	<ul style="list-style-type: none"> Brainstorm a list of possible mentors (<i>See Identifying Potential Mentors, this page</i>).
6. Eliminate options that don’t meet the “musts.”	<ul style="list-style-type: none"> Evaluate each possible mentor against the “musts.” If they cannot fulfill them, do not consider him or her further.
7. Rate each option against “wants.”	<ul style="list-style-type: none"> Compare how well each of the remaining options stacks up against your “wants.” Assign a numeric rating (e.g., 1–10) for each potential mentor to measure how well he or she measures up against each “want.”
8. Make the decision.	<ul style="list-style-type: none"> Tally the numeric score to identify which of the candidates best meets your desired end result based on the criteria you established.

Adapted from The Mentor’s Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

B. Identifying Potential Mentors

Mentors should be chosen with care. Look to the faculty and the profession for those individuals who you think could offer the students the most growth opportunity. Be mindful of the diversity of your students and find diverse role models. Use the following guidelines to locate and identify potential mentors:

- Use faculty networks to reach out in the community.
- Follow up with people your faculty already knows. They can tap into their networks, expanding your pool of potential mentors.
- Explore the interest of graduates/alumni as they may wish to provide a service they themselves received while as a student.
- Look for and approach successful people that have achieved what you hope your students might achieve. For example, your mentor may be found within associations or professional organizations outside of nursing.
- Reach back into history. Contact faculty from your faculty’s nursing school days or other people that faculty met as they were entering the professional field.

C. Selecting/Recruiting Mentors

Identify a pool of mentor candidates. You will need enough mentors to adequately serve your students. Depending on the number of mentors you recruit, you may have a 1 mentor: 1 student framework or you may have a 1 mentor: 2 student framework. If the mentors are willing to have more than one mentee, do not overload them in order to prevent mentor burnout AND to avoid the sense that the students will not have a degree of confidentiality with their mentors.

In order to ensure that your students receive the best mentoring possible, evaluate your mentors along the criteria you identified and consider these aspects as well:

- Will this person challenge the students to raise the bar for themselves?
- Does this person listen well?
- Does this person have a sincere desire and willingness to mentor?
- Will this person encourage the students and provide honest feedback?
- Does this person have the knowledge and expertise the students need (are they a learning fit)?
- Is this person a positive role model?
- Will this person have sufficient time to mentor a student or students?
- Is this person accessible enough (geographically or physically) for the students' needs?
- Is the mentor likely to be compatible in temperament and personality?
- Will the student feel comfortable learning and interacting with this person over an extended period of time?
- Has this person demonstrated personal achievement and involvement with the profession?
- Has this person demonstrated mentoring capabilities—either naturally expresses mentoring qualities or previously served in a mentoring role before?
- Has this person actively supported or facilitated students' growth in any other context?

Not all individuals who respond to your inquiries are right for your mentoring program. Share with the potential mentors the requirements of your mentor program and ask if they can commit to them. Ask the mentor to provide names of individuals who can provide references for their mentoring abilities. Choose with care.

Provide your potential mentors with the following handouts so that they can understand what you are asking of them: Mentoring Requirements (note: you should amend this handout to fit your criteria), the Learner-Centered Mentoring Program Model, and the Mentoring Process. The handouts can be found on pages 14-16.

Secure a commitment for their participation once they have had time to look at the handouts!

MENTORING REQUIREMENTS

WHAT IS MENTORING?

Mentoring is a reciprocal learning relationship in which mentor and mentee agree to a partnership where they will work collaboratively toward achievement of mutually defined goals that will develop a mentee's skills, abilities, knowledge and/or thinking.



WHAT YOU ARE ASKED TO COMMIT TO:

- The Mentoring Program (see *Learner-Centered Model and Mentoring Process*, page 16)
- Committing time to mentoring — making it a priority
- Building a relationship with the student(s) you mentor
- At least 2 meetings per month, at least 1 hour in length each
- Being available by phone/email/text (within reason)
- Communicating openly
- Facilitating the student's learning
- Actively listening and giving feedback without judgment
- Working through any issues that arise in the mentoring relationship
- Evaluating the process
- Learning about yourself

WHAT YOU CAN EXPECT TO GAIN:

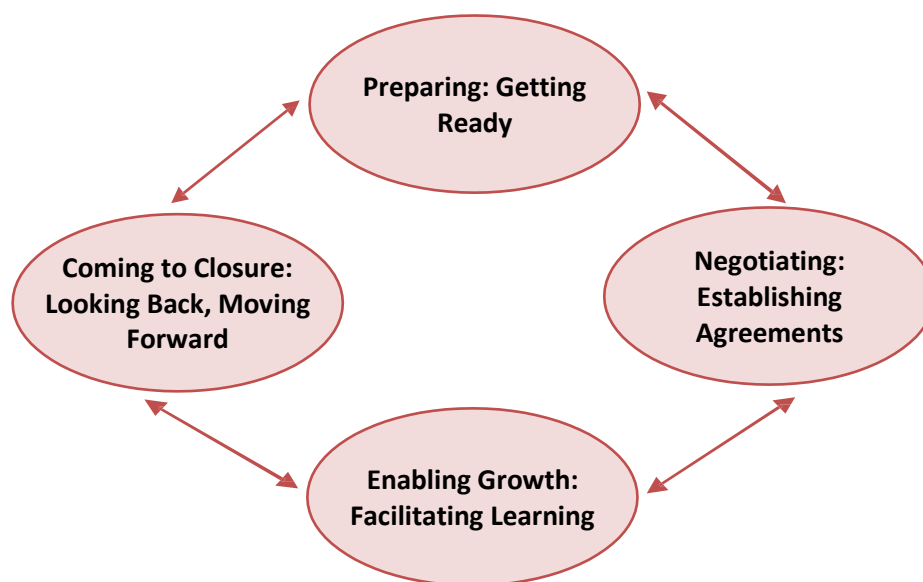
- Pride in being a part of someone else's growth and development in the nursing profession
- Growth and development for yourself
- A relationship with a new person
- Satisfaction of sharing your knowledge and experiences
- Practice in listening and giving feedback
- Insights on how others struggle with issues and make choices
- Practice working through issues with others
- Feedback on how you facilitate growth for others
- A chance to inspire others to be mentors while practicing your mentoring skills
- A relationship with a new person

THE LEARNER-CENTERED MENTORING MODEL

Mentoring Element	Characteristics	Adult Learner Principal
Mentee Role	Active partner	Adults learn best when they are involved in diagnosing, planning, implementing, and evaluating their own learning
Mentor Role	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	Self-directed (mentee is responsible for their own learning)	Adult learners have a need to be self-directing
Length of Relationship	Goal-determined	Readiness for learning increases when there is a specific need to know
Mentoring Relationship	The mentor will be one of many over the mentee's lifetime. Mentoring may also occur concurrently within the mentee's other groups or with mentee's peers.	Life's reservoir of experience is a primary learning resource; the life experiences of others add enrichment to the learning process
Setting	Multiple and varied venues and opportunities (face to face, phone, electronic methods)	Adult learners have an inherent need for immediacy of application
Focus	Process-oriented (knowledge acquisition, application, and critical reflection)	Adults respond best to learning when they are internally motivated to learn

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2012)

THE MENTORING PROCESS



Preparing: Getting Ready

Each mentoring relationship is unique. Both mentor and mentee must prepare individually and in partnership to ensure a successful mentoring experience. This is a discovery process that lets both the mentor and the mentee determine the viability of their prospective relationship.

Negotiating: Establishing Agreements

The business phase of the mentoring relationship is when the mentor and the mentee agree on the learning goals and define the content and process of the relationship. Together, the mentor and mentee create a shared understanding of their assumptions, expectations, goals, and Needs—particularly around confidentiality, boundaries, and limits so that they can build trust. The mentor and mentee will determine the “nuts and bolts” of when and how to meet, roles and responsibilities, criteria for success, how to be accountable to each other, and how to close the relationship.

Enabling Growth: Facilitating Learnings

This is the implementation stage of the relationship, where learning takes place. The mentor nurtures the mentee’s learning during this phase by establishing and maintaining an open and affirming learning climate and by providing thoughtful, timely, candid, and constructive feedback. Both the mentor and the mentee monitor the learning process to ensure the mentee’s learning goals are met. During this phase, obstacles to the process may arise and the mentor and mentee address them together.

Coming to Closure: Looking Back, Moving Forward

This phase of the process calls for evaluating, acknowledging, and celebrating achievement of the learning goals. It is an opportunity to evaluate personal learning for both the mentor and the mentee, and to apply that learning to other relationships and situations.

Adapted from The Mentor’s Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2012)

D. Meet with the Mentors

Now that you have mentors on board, set up a meeting for them to get to know each other, ask questions about the program, and begin to form their own supportive bonds between themselves. Mentors need to be able to check in with each other so that if/when similar issues arise for students involved in the program, they can bring that to your attention.

PART II: INTRODUCING THE MENTORSHIP PROGRAM

Section One: Introduction

In order to have a successful mentorship program, the mentors and the students need to understand your program's mentoring model and process. Both the mentors and students need to know what is expected of them and how to be successful in the program.

Once you conduct an initial meeting that allows the mentors and students to meet, you can gain their input on potential matches and more easily match mentors to students.

Section Two: Introductory Session and Mentor Matching

Introducing the Mentorship Program Action Items:

- A. Mentor Program Introductory Session (Including Sample Agenda)**
- B. Mentor Matching Requests**

A. Mentorship Program Introductory Session

The easiest way to kick off your mentoring program is to introduce the mentors you've selected to the students in one setting. You can brief both groups on the mentoring model and process you will be using.

You can also get them started on the relationship building process and allow them to participate in the mentor-student matching process.

A sample agenda for an introductory session as well as guides for the activities recommended in the sample agenda begin on the next page.

MENTORING PROGRAM INTRODUCTORY SESSION – SAMPLE AGENDA

Approximate Time	Activity	Lead	Resources
5-10 minutes	Welcome — Introduction to Mentor Program. The objectives for today are: <ol style="list-style-type: none"> 1) To hear about the program and its requirements; 2) To get to know each other; and 3) To get your input into the mentor matching process (mentors and students will give us their top three choices and we will do the matching and let you know who you will be working with for the next several months)! 	Dean, Program Liaison	
	Review of Agenda/Logistics — Cell phones off, location of restrooms.	Program Liaison	
10-20 minutes (depending on size)	Student Introductions/Mentor Introductions — Each person gives their name and where they have been working/are working.	Program Liaison	
30 minutes	Overview of Mentoring Guidebook <ul style="list-style-type: none"> • Review the Mentoring Model; • Review Mentoring Process; • Review Mentoring Agreement; and • Ask mentors and student mentees to review the Mentoring Guidebook so they complete the necessary pre-work required before the mentoring meetings start AND so they understand what they will need to do to complete the program successfully. 	Program Liaison	Page 41, Mentoring Guidebook
35 minutes	Getting to Know You Exercise — Participants get to introduce each other so that they begin to get a sense of what each person brings to the program.	Program Liaison or Faculty Member	Page 20, including handout
(depends on group size)	Speed Matching — Participants pair up and engage in a 5-10 minute conversation about the information they shared about themselves in the Getting to Know You Exercise. Hold successive 5-10 minute rounds until all potential mentors have met all student mentees.	Program Liaison or Faculty Member	Page 24, including handout
15 minutes	Matching Requests — Students each give their top three choices of mentors; mentors give their top three choices of students. Matching is done by the school and assignments are communicated to mentors and students by the school within one week.	Program Liaison	Page 27, including request form
5 minutes	Close	Program Liaison	

1. Getting to Know You Exercise

This exercise will help the mentors and the students know each other better and explore their options for a mentoring match. This also allows the students to start to build networking relationships with professionals in the nursing field that will last throughout the program and beyond.

The exercise is comprised of the Getting to Know You Exercise Facilitation Guide, and the Handout: Interview Protocol. These documents follow on the next page.

GETTING TO KNOW YOU EXERCISE – FACILITATION GUIDE**Purpose**

This exercise provides a means for both mentors and students to get to know each other on a deeper level while promoting listening and relationship building skills.

Process

Exercise Total Time Frame: 35 minutes minimum (depends on size of the group)

Setting: Any

Preparation

- Make enough copies of the Interview Protocol Handout for all participants.
- Review the handout and familiarize yourself with the content to be presented.

RESOURCES NEEDED

- ✓ Interview Protocol Handout

Step 1. Getting a sense of who is present. (5 minutes)**Open with the following or similar comments:**

You will be engaged in the mentoring program to provide support to students in the nursing program. This exercise will give you a sense of who is in the room today and will allow you to have some input into the mentor matching that will take place.

This exercise also provides you with the opportunity to begin building networking and/or professional relationships that will last throughout your careers.

Step 2. Interview protocol. (10 minutes)

Have the mentors and students divide themselves into pairs (one mentor and one student) or groups of three if there is an odd number (pairs preferred), depending on the group size.

Distribute the Interview Protocol Handout and tell the group:

Pairs have 3 minutes to interview each person or a total of 6 minutes to interview both people. Groups of three people have 2 minutes per person for a total of 6 minutes to interview everyone in the group.

Tell the group: The format is an interview format — one person asks the questions, the other answers — **this is not** a discussion.

Give the group time announcements at 2 minutes, 3 minutes, and 4 minutes so they can switch roles.

Step 3. Introductions. (15 minutes, approximate — depends on size of group)

Have each person introduce the individual they interviewed, 1 minute summaries — summarizing the information or going through it briefly without adding additional comments.

Step 4. Debrief. (5 minutes, approximate — depends on size of cohort)

Ask the group to comment on what they learned about their fellow group members. Were there any surprises? What did they learn? Did they find they had something in common with someone else? Did they hear about something that interested them? Did they hear anything that reminded them of themselves?

Step 5. Close.

Thank everyone for participating. Let them know that the next step is the Matching Request part of the session. Everyone — mentors and students — will get to list their top three choices and you will match everyone based on that input (as much as possible)!

GETTING TO KNOW YOU EXERCISE - INTERVIEW PROTOCOL HANDOUT**Timing:**

Pairs get 3 minutes to interview each person — 6 minutes total.

Groups of three get 2 minutes to interview each person — 6 minutes total.

Suggestions:

- Take notes
- Listen to each other from a place of curiosity and acceptance

1. What are the accomplishments you are most proud of personally?

2. What are the accomplishments you are most proud of professionally?

3. How did you select nursing as your career/what drew you to the nursing profession?

4. What would you like to gain from your participation as a mentor/mentee?

2. Speed Matching Exercise

In order for students to make their choices for mentors, they need additional information. The speed matching exercise allows them to ask more questions based on the information they heard during the Getting to Know You Exercise. Students can go through the exercise with the “Is It a Match?” handout questions in mind.

The exercise is comprised of the Speed Matching Exercise Facilitation Guide and the Handout: Is It a Match? These documents follow on the next page.

SPEED MATCHING EXERCISE - FACILITATION GUIDE**Purpose**

This exercise provides a means for both mentors and student mentees to get to know each other on a deeper level and start the mentor/mentee matching process.

RESOURCES NEEDED

- ✓ Is It A Match? Handout

Process

Exercise Total Time Frame: (depends on size of the group) – allow for 5-10 minute discussion rounds

Setting: Any

Preparation

- Make enough copies of the “Is It a Match?” handout for all participants.
- Review the handout and familiarize yourself with the content to be presented.

Step 1. Mentor matching. (5 minutes)**Open with the following or similar comments:**

Now that you’ve heard some general information about the people in the room, we are going to move into 1:1 conversations so that you can get more information about each other. Remind one another of the information shared with the group and explore further—taking the conversation wherever you want.

This exercise also provides you the opportunity to determine with whom you might “fit” in a mentoring partnership.

Step 2. Speed matching conversations. (5-10 minute rounds)

Have mentors and students divide themselves into pairs (one mentor and one student). If there are an odd number of students or more students than potential mentors, then have students pair up with mentors after the initial round of speed matching conversations take place.

Distribute the “Is It a Match?” Handout and tell the group:

Pairs have 5 (or 10) minutes to talk with each other to begin to determine if there is a potential match for a mentoring partnership.

The handout contains questions that each of you should think about as you have your conversation. Prior to making mentor requests (which will be done at the end of the day), participants will need to reflect on these questions based on the conversations that occurred during this exercise.

Begin the conversational rounds.

Give the group time announcements at 4 (or 9) minutes to wrap up, and at 5 (or 10) minutes so that they can switch partners.

Step 3. Close.

Thank everyone for participating. Let them know that the next step is the matching request part of the session. Everyone – mentors and students – will get to list their top three choices and matches will be made based on that input.

IS IT A MATCH? EXERCISE HANDOUT

The following questions will help you assess whether there is a “fit” as mentor and student mentee. Read over these questions and keep them in the back of your mind as you participate in the speed matching exercise. Reflecting on these questions will help in the mentor/mentee request process.

Is it a Match?
<ul style="list-style-type: none"> • Will this person challenge me to raise the bar for myself?
<ul style="list-style-type: none"> • Does this person listen well?
<ul style="list-style-type: none"> • Does this person have a sincere desire and willingness to mentor?
<ul style="list-style-type: none"> • Will this person encourage me as well as provide honest feedback
<ul style="list-style-type: none"> • Does this person have the knowledge and expertise I need (learning fit)
<ul style="list-style-type: none"> • Is this person a positive role model?
<ul style="list-style-type: none"> • Will this person have sufficient time to mentor me?
<ul style="list-style-type: none"> • Is this person accessible enough (geographically or physically) for my needs?
<ul style="list-style-type: none"> • Are we compatible in temperament and personality?
<ul style="list-style-type: none"> • Will I feel comfortable learning and interacting with this person over an extended period of time?

Adapted from The Mentee's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2012)

3. Mentor Matching Requests

Instead of leaving the matching of mentor-to-student to chance, use input from the Mentoring Program Introductory Session to match who you can and then use your judgment to match anyone left without a match. As you do the matching, make sure to use all of the information you know about both the students and mentors. You will have to resolve any imbalance in requests for any particular mentor or student. The Matching Request Form follows on the next page.

MATCHING REQUEST FORM

Instructions: Have both the prospective mentors and student mentees fill out the matching request forms and turn them into the mentoring program liaison before the end of the Mentoring Program Introductory Session.

My name is: _____

My first choice for mentor/mentee (circle one) is: _____ because

My second choice for mentor/mentee (circle one) is: _____ because

My third choice for mentor/mentee (circle one) is: _____ because

PART III: THE MENTORING RELATIONSHIP

Section One: Introduction

Once you've made the mentoring matches, it is up to the pairs to start working through the Mentoring Guidebook you provided in the Mentoring Program Introductory Session.

Your job is to provide support if the mentors or students have questions, help them deal with issues that arise during the mentoring relationship, and/or otherwise be available to support both the mentors and student mentees as they move through the program.

Part two of this toolkit is the guidebook for the mentoring relationship that the mentor and student mentee create together. The guidebook outlines the complete process for the mentor and student mentee to follow from the beginning of their relationship to its completion. The book includes helpful resources so that both the mentor and student mentee can build mentoring and communication skills as the student mentee's learning and development take place.

The guidebook contents include the following sections:

- Purpose
- The Concept of Mentoring
- The Learner-Centered Mentoring Model
- The Mentoring Process
- Preparing for the Mentor Relationship
- The Mentoring Agreement: Creating a Shared Understanding
- Setting the Goals
- Maintaining the Mentoring Relationship
- Building Rapport
 - Listening
 - Giving and Receiving Feedback
 - Resolving Differences Constructively
 - Reflection and Accountability
- Closing the Mentoring Relationship
- Moving On

Section Two: Mentoring Relationship Issues

From time to time, issues arise during mentoring relationships. It is always best to try and explore with the mentor and student mentee if a relationship can get back on track. Remind them that each has made the commitment to keep things moving forward and try to work through issues.

Review with the mentor and mentee if they:

- Set goals

- Kept to their roles
- Met as agreed
- Discussed learning and communications styles
- Routinely evaluated their mentoring partnership
- Kept confidentiality
- Addressed the boundary/hot button/stumbling blocks that might occur and created processes to solve them

Specifically ask what they have done to address the issue so far and if they have set up processes to address stumbling blocks. Help them walk through their process and guide them as necessary.

If the differences cannot be resolved, you may need to reassign mentors and student mentees in order to best serve both the mentor and the student mentee.

PART IV: EVALUATING AND CLOSING THE PROGRAM

Section One: Introduction

A mentoring program is a work in progress and must have continuous feedback. Once the mentoring relationship comes to a close, ask both the mentor and the student mentee to complete a reflection and evaluation form so that you can fine-tune your program.

Once that is done, a formal closing of the program is in order. Gather your mentors and student mentees for a celebratory session and have them share some of their insights and growth.

MENTORING PROGRAM CLOSING SESSION – SAMPLE AGENDA

Approximate Time	Activity	Lead	Resources
5–10 minutes	Welcome — Introduction. The objectives for today are: 1) To close out the mentoring program; 2) To share some of what both the mentors and student mentees have learned from the process; and 3) To get your feedback on the mentoring program so that you can help improve it.	Dean, Program Liaison	
	Review of Agenda/Logistics — cell phones off, location of restrooms	Program Liaison	
10–20 minutes (depending on size of group)	Student Introductions/Mentor Introductions — Mentors and student mentees introduce each other with one sentence each.	Program Liaison	
30–45 minutes	Program Take Aways — Have the group individually reflect on what they have learned through the mentoring process (1-2 minutes). Let anyone volunteer to begin the sharing (or pick someone if no one volunteers) and continue until all have shared.	Program Liaison, Mentors and Student Mentees	
	Evaluations — Ask the mentors and student mentees to provide feedback on the program so that they can be a part of its improvement. Hand out the evaluation forms.	Program Liaison or Faculty Member	Pages 32-34 Including evaluation forms
5 minutes	Close — Have the Program Liaison and/or Dean thank the mentors and student mentees for their participation in the program. Give out certificates or gifts (if applicable).	Program Liaison	Optional: certificates and/or gifts

Section Two: Evaluation Forms

Both the mentor and the student mentee should fill out the evaluation forms as part of the closing session agenda. Evaluation forms follow on the next page.

MENTOR EVALUATION FORM

Instructions: Have the mentor complete this evaluation form regarding his/her experience with the student mentee.

Mentor's Name: _____

I mentored the following student mentee(s): _____

The program requirements were clear to me (circle one): YES / NO

If yes, what was helpful in making the requirements clear? _____

If no, what would be more helpful in making the requirements clear? _____

The support level from the mentor program liaison was appropriate (circle one): YES / NO

If no, what would improve the support level provided? _____

I was well-matched with my student mentee(s) (circle one): YES / NO

If no, what improvements would you suggest in the matching process? _____

I learned the following about myself as a mentor during this mentorship: _____

I found the following to be a rewarding part of participating in the mentor program: _____

STUDENT MENTEE EVALUATION FORM

Instructions: Have the student mentee complete this evaluation form regarding his/her experience with the mentor.

Student Mentee’s Name: _____

I was mentored by the following mentor(s): _____

The program requirements were clear to me (circle one): YES / NO

If yes, what was helpful in making the requirements clear? _____

If no, what would be more helpful in making the requirements clear? _____

The support level from the mentor program liaison was appropriate (circle one): YES / NO

If no, what would improve the support level provided? _____

I was well-matched with my mentor(s) (circle one): YES / NO

If no, what improvements would you suggest in the matching process? _____

I learned the following about myself during the program: _____

I found the following to be a rewarding part of participating in the mentor program: _____

The most valuable things I learned from my mentor were: _____

I was able to meet all of my learning goals with my mentor's help (circle one): YES / NO

If no, what would have helped you to meet all of your learning goals? _____

I would recommend this mentor to others (circle one): YES / NO

If yes, why? _____

If no, why not AND what would improve this mentor's ability to mentor? _____

General Comments:

Please add anything you think would be relevant for the Mentoring Program Liaison to know in order to improve the mentoring program.

SAMPLE MENTORING PROGRAM

Step One: Assessment

A. Mentoring Program Activities

What ongoing programmatic mentoring program currently exists in your organization? Do you have individual(s) designated as a mentor program director? Do you have a specific model that you use? Do you provide a time for mentors and mentees to meet? How do you evaluate the program?

Strengths:

Opportunities for Improvements:

B. Mentoring Program Support

What is already happening outside of your organization that may impact your mentoring program? Do you have supports in place for mentors and mentees? Do you have a pool of mentors to draw from? Do you have a closing process for the mentors and mentees once the program ends?

What works well in your organization and what are potential challenges (e.g., timing of events, activities of other organizations in this space, barriers you may face, other potential obstacles or opportunities)?

Identify supports available in school and community.

Assets:

Challenges:

Step Two: Mentoring Program Design

1. Broad Goal: What will be the learning goals for your program?

2. Evaluation: How will you evaluate and close the mentoring relationships?

3. Mentoring Process: How do you plan to approach the mentoring process?

How will you select mentors? How will you match mentors with mentees?

Step Three: Program Implementation			
Decisions to Make	Mentor Recruitment	Introducing Mentoring Program	Evaluation and Closing the Program
Activities:			
Time Frames:			
Resources:			

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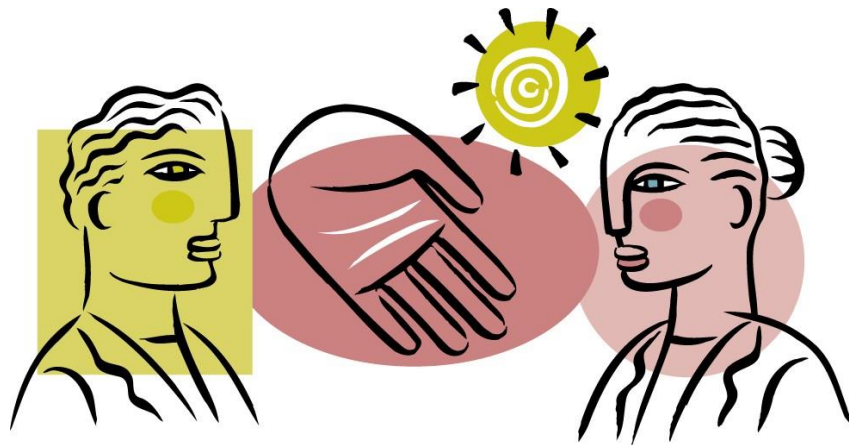
PURPOSE

The purpose of this Mentoring Guidebook is to guide mentors and student mentees as they develop and move through the mentor relationship that is provided by the mentoring program. Resources in this guide are designed to help the mentor and student mentee build a strong relationship through which the student mentee receives support as he or she moves through the nursing program.

WHAT IS MENTORING?

Mentoring is a reciprocal learning relationship in which mentor and mentee agree to a partnership where they will work collaboratively toward achievement of mutually defined goals that will develop a mentee's skills, abilities, knowledge, and/or thinking.

Mentoring involves support provided to students that entails emotional and psychological guidance and support, help succeeding in academic coursework, assistance examining career options, and the presence of a role model from whom the student can learn.

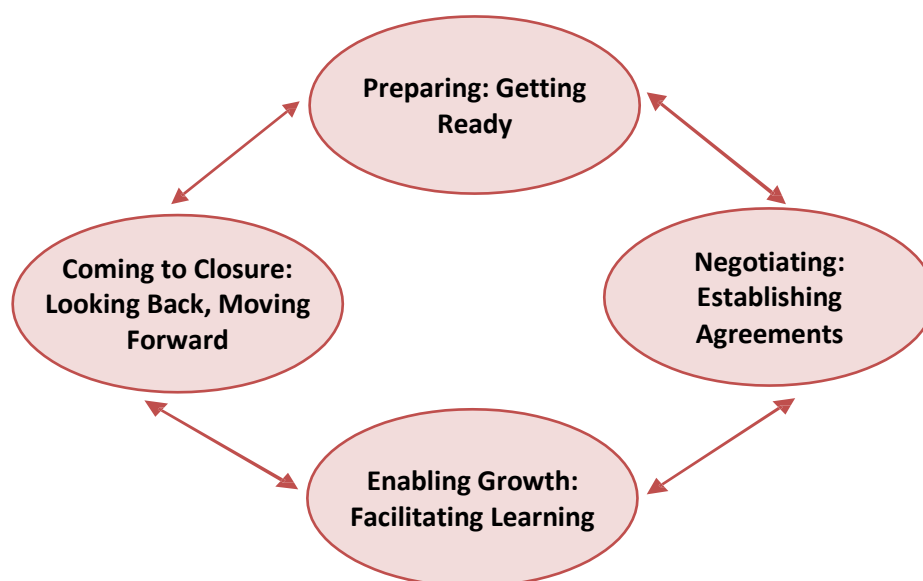


THE LEARNER-CENTERED MENTORING MODEL

Mentoring Element	Characteristics	Adult Learner Principal
Mentee Role	Active partner	Adults learn best when they are involved in diagnosing, planning, implementing, and evaluating their own learning
Mentor Role	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	Self-directed — Mentee is responsible for own learning	Adult learners have a need to be self-directing
Length of Relationship	Goal determined	Readiness for learning increases when there is a specific need to know
Mentoring Relationship	The mentor will be one of many over the mentee's lifetime Mentoring may also occur concurrently within the mentee's other groups or with mentee's peers	Life's reservoir of experience is a primary learning resource; the life experiences of others add enrichment to the learning process
Setting	Multiple and varied venues and opportunities (face to face, phone, electronic methods)	Adult learners have an inherent need for immediacy of application
Focus	Process oriented – Knowledge acquisition, application and critical reflection	Adults respond best to learning when they are internally motivated to learn

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

THE MENTORING PROCESS



Preparing: Getting Ready

Each mentoring relationship is unique. Both mentor and mentee must prepare individually and in partnership to ensure a successful mentoring experience. This is a discovery process that lets both the mentor and the mentee determine the viability of their prospective relationship.

Negotiating: Establishing Agreements

The business phase of the mentoring relationship is when the mentor and the mentee agree on the learning goals and define the content and process of the relationship. Together, the mentor and mentee create a shared understanding of their assumptions, expectations, goals, and Needs—particularly around confidentiality, boundaries, and limits so that they can build trust. The mentor and mentee will determine the “nuts and bolts” of when and how to meet, roles and responsibilities, criteria for success, how to be accountable to each other, and how to close the relationship.

Enabling Growth: Facilitating Learnings

This is the implementation stage of the relationship, where learning takes place. The mentor nurtures the mentee’s learning during this phase by establishing and maintaining an open and affirming learning climate and by providing thoughtful, timely, candid, and constructive feedback. Both the mentor and the mentee monitor the learning process to ensure the mentee’s learning goals are met. During this phase, obstacles to the process may arise and the mentor and mentee address them together.

Coming to Closure: Looking Back, Moving Forward

This phase of the process calls for evaluating, acknowledging, and celebrating achievement of the learning goals. It is an opportunity to evaluate personal learning for both the mentor and the mentee, and to apply that learning to other relationships and situations.

Adapted from The Mentor’s Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

PREPARING FOR THE MENTORING RELATIONSHIP

In order to have a successful mentorship, mentors and student mentees need to prepare before their first meeting so that they have a framework for building a strong relationship and setting goals efficiently and effectively.

Review the following “to do” list and make sure both the mentor and student mentee are prepared to create—during the initial conversation—an agreement about how the mentoring partnership will work. Both the mentor and the student mentee should reflect on the questions to ponder so that they can create an agreement that meets both their needs. Additional helpful questions to consider are in the following mentor and mentee worksheets.

To Do List	Strategies for Conversation	Questions to Ponder
1. Take time to get to know each other.	Obtain a copy of each other’s bio in advance of the conversation.	What kind of information might you exchange to get to know each other better? What points of connection have you discovered in your conversation? What else do you want to learn about each other?
2. Share mentoring stories.	Share your previous mentoring experiences with one another.	What did you like about your experiences that each of you would carry forward in this relationship?
3. Talk about both the mentee and mentor’s learning and development goals.	Each person should describe their career vision, hopes and dreams, and articulate broad learning goals and the reasons why they are important.	Why does your mentee/mentor want to engage in this relationship? What learning goals would align with each person’s vision of the future?
4. Determine relationship needs and expectations.	Ask each other what he or she wants, needs, and expects out of the relationship.	Are you clear about each other’s wants, needs, and expectations for this mentoring relationship?
5. Candidly share personal assumptions and limitations.	Talk about the mentoring assumptions and limitations you each bring to the relationship. Discuss implications for your relationship.	What assumptions do you hold about each other and your relationship? What are you each willing and capable of contributing to the relationship? What limitations do you each bring to the relationship?
6. Discuss learning and communication styles.	Talk about your personal styles. Use any learning style inventory that appeals to you.	How might each other’s styles affect the learning that goes on in the mentoring relationship?

Adapted from The Mentor’s Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

MENTOR WORKSHEET

Instructions: Think about your mentoring experiences and the people who were there to guide you, support you, and strengthen you. You will share this information with the student you will be mentoring.

- My mentors were:
 - At what point(s) 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?
-
- What do you need to know about the student you will be mentoring in order to have a better sense of where they are in their life?
 - Is there more information you need; what questions will you ask the student? What information can you gather from other sources?
 - What insights do you have about the student's life that might affect the student's readiness to learn?

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

STUDENT MENTEE WORKSHEET

Instructions: Think about your life so far — what milestones have you achieved? What challenges, disappointments, transformative events, and changes have you encountered along the way? You will share this information with your mentor.

- Describe three to four milestones that contributed to your personal development. Of these, which affected you the most and why?
 - Identify your top three personal and professional successes. Describe the role you played and why you felt each was successful. Which one are you most proud of and why?
 - What were the major personal and professional challenges you faced? Why were they particularly challenging and what specifically did you do to respond or overcome them?
 - How are you different today than you were five years ago?
 - Create a realistic balance sheet of your current personal and professional strengths and challenges. Are you using your strengths? Are there gaps that you need to fill? Are there challenges that must be faced?
 - What barriers are you creating for yourself? Do you notice any patterns?
 - What false assumptions might you have about your role, impact, or value or your self-confidence? Is there a difference in how you perceive your impact versus how others perceive your impact?
-
- Do you have a personal vision? Formulate a general vision if you do not have one yet.
 - Have you taken steps to realize that vision?
 - Do you know what steps you need to take to achieve it?

Adapted from The Mentee's Guide: Making Mentoring Work for You (Lois J. Zachary, 2012)

THE MENTORING AGREEMENT: CREATING A SHARED UNDERSTANDING

Common Mentoring Ground Rules

Dimension	Approach
Time	Our meetings will begin and end on time. We will manage our time efficiently. We will put interruptions aside.
Role Expectation	We will engage in active participation. We will honor and respect expertise and experiences.
Communication	Our communication will be open, candid, and direct. We will respect our differences and learn from each other. We will address issues as they come up.
Feedback	We will engage in giving and receiving feedback.
Closure	In the event that our mentoring relationship does not work, we will have a closure conversation.

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

Instructions: During the first meeting, after the mentor and student mentee have shared their preparatory work, the pair should move into the phase of negotiation where they establish a shared understanding of how they will work together. Use the following framework to guide the discussion and note the agreements you make so both the mentor and mentee are clear on how the partnership will operate.

Goals

- Share expectations and goals.
- Identify specific learning goals that each person wants to achieve during the mentoring relationship.
- Identify the process or steps for achieving those goals.
- Identify the criteria for evaluating successful accomplishment of the learning goals.
- Identify how successful completion of the goals will be celebrated.
- Evaluate the goals.

Note: Use the goal setting information (pages 50-53) to guide this process.

Roles and Responsibilities

- Review each person's roles based on the following lists, making changes as necessary.

Mentor role

- Be a positive, professional role model
- Assist the student mentee in deciding which issues are appropriate to be addressed during the mentoring relationship and which should be referred to another person
- Introduce the student mentee to others; assist mentee in developing professional networks
- Guide the student mentee in developing skills of reflection and learning from experience
- Challenge assumptions and the status quo
- Provide constructive feedback when asked
- Encourage independent decision making
- Assist the student mentee to set professional career goals
- Provide a listening ear
- Help student mentee identify potential personal and professional development opportunities
- Be aware of personal values/beliefs and ensure these are not imposed on student mentee
- Support, encourage and inspire the student mentee
- Help problem solve and identify potential solutions and relevant resources
- Be empathetic

Student Mentee Role

- Bring forth professional and career issues for discussion
- Make own decisions
- Be prepared to take risks
- Look for new challenges
- Set professional goals
- Take appropriate advantage of professional development opportunities suggested by the mentor
- Share openly with the mentor
- Accept constructive criticism, use feedback wisely
- Disclose frustrations and concerns

Adopted from Maximizing Your Mentoring Relationships: Resource Guide (Susan Murphy, 2009)

Accountability

- Decide on frequency of contact and methods (e.g., 2x/month in person, reachable in between meetings by phone, text, email, skype, etc.).
- Discuss communication styles. Do you think out loud? Do you need time to think before responding? Do you prefer face-to-face, phone, email, or some combination of those methods?
- Discuss learning styles — share any assessment (e.g., Myers-Briggs, Learning Styles Inventory, or similar information you may have).

- Discuss how each person likes to receive feedback. Note: Use exercises in this guide (pages 57-59) to direct the discussion and ultimately how feedback is delivered.
- Discuss length of mentorship and set assessment points (e.g., 30, 60, or 90 days).
- Discuss process for notifying each other if these agreed upon points need to be altered or changed.

Confidentiality

- Discuss and agree on confidentiality levels regarding the mentoring subject matter and the mentoring relationship. Is it okay to share information in order to enlist others' support and/or to ensure the best mentoring experience? And, is it okay to share information with others in order to resolve mentoring relationship issues?

Boundaries/Hot Buttons/Stumbling Blocks

- Discuss and agree on boundaries for the relationship (e.g., meetings and calls only during work hours, after hours, at work, at home, expectations around response times to texts and emails).
- Discuss "what ifs" or stumbling blocks that might come up and identify a process for preventing them from derailing the relationship and/or setting the relationship back into motion if it has become derailed.
- Discuss hot buttons. What sets each person off? Determine a process for letting the other person know when a hot button has been pushed.
- Discuss and identify a process for how to handle hot button or other issues that may arise within the mentoring relationship. Can you raise issues face to face? When might you need to raise issues with the Mentoring Program Liaison?

Closure

- Discuss the best-case scenario for closing the relationship.
 - What would we ideally like to see happen when the mentoring relationship comes to an end?
 - What can we do to help the relationship reach a positive learning conclusion?
 - If the ideal isn't possible, how can we still ensure a positive learning outcome?
- Anticipate worst-case scenarios and potential obstacles.
 - What might get in the way of a positive learning conclusion?
 - What might a positive learning conclusion look like under these circumstances?
- Identify the process for how you will close the mentoring relationship. Include a step in the process for reflecting on the relationship and sharing those reflections.
- Identify how you will we celebrate or mark the closure of the relationship.

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

SETTING THE GOALS

The mentoring relationship works best when the mentor and student mentee set goals that they can achieve together during the mentoring relationship. The goals set will predominantly be those of the student mentee but the mentor may also have goals that he or she wants to set.

Why Set Goals?

- ✓ **Goals set a clear direction.** Goals are a reminder of where you want to go or a level of achievement you want to attain. You set your own goals based on what is meaningful to you. Writing down your goals (making them tangibly real as a commitment) supports successful accomplishment of your goals.
- ✓ **Goals focus your time and effort.** Goals allow you to focus. Goals are individual choices you make among all the wonderful things there are to do, have or achieve in the world. Without some focus, we would not be able to accomplish much.
- ✓ **Goals remind us what we want and why it matters to us.** The “why” behind a goal (the reason you want to accomplish the goal) comes from your personal desire and motivation — what is meaningful to you. Goals can help you remember what is important to you and support you as you keep focused and moving toward the goal.
- ✓ **Goals help clarify priorities.** If something comes up, you can ask yourself, “Will this new thing get me to my goal?” If not, you can move ahead to your goal without distraction, focusing on those things that get you to your goal...the priorities.
- ✓ **Goals provide a way to make daunting achievements realizable.** By writing down the action steps for your goals, you identify the framework that allows you to make incremental and steady progress to the ultimate goal.

Use the SMART goal setting criteria and framework on the next few pages to set the goals for the student mentee and the mentor.

SMART GOAL SETTING CRITERIA

A SMART goal is:

- ✓ **Specific** — The goal is clearly identified so that it answers the questions:

Who: Who is involved?

What: What do I want to accomplish? Is the goal a challenge or a stretch for the mentee and/or the mentor, with a focus on future development?

Where: Identify a location, if appropriate.

Which: Identify requirements and constraints, if any.

Why: Specific reasons, purpose or benefits of accomplishing the goal. Why is the goal important to your development and success?

- ✓ **Measurable** — The success toward meeting the goal can be measured. Measurement is objective and answers the question: How will I know if I've done it?
- ✓ **Action-Oriented and Attainable** — Action-oriented means you must identify the strategy or strategies for how you will achieve the goal. In addition, an attainable goal answers the question: Can the strategies be executed in the time frame I select?
- ✓ **Realistic** — To be realistic, a goal must represent an objective toward which you are both willing and able to work. A realistic goal answers the question: Am I willing and able to do this?
- ✓ **Timely** — The goal has a clearly defined time frame including a target date. Having a time frame answers the question: When will I achieve the goal?

EXAMPLE:

A general goal would be, "Get in shape." But a specific goal would say, "I will join the health club on 2nd Street for \$30/month and workout 3 days a week in order to lower my cholesterol levels and build my aerobic capacity."

GOAL SETTING FRAMEWORK

<p>Goal: What do you want to achieve?</p>	<p>Action Steps/ Strategies: What steps will you take to achieve the goal?</p>	<p>Measurement/ Objective Evidence: How will you know when each goal is achieved? What will you be doing or saying differently?</p>	<p>Celebration: What will you do to celebrate reaching each goal?</p>

EVALUATING THE GOALS

1. Is your goal clearly anchored in the future? How do we know that?
2. Is the goal realistic? What evidence do we have to support that it is?
3. Will the goal be challenging? That is, is it a stretch goal rather than a maintenance goal? In what ways?
4. Will this goal help you grow personally or professionally? How?
5. Will this goal require you to make a personal investment of time, energy, and effort? Is this something that you can manage?
6. Is this goal achievable within the timeframe of our mentoring relationship? What makes you think that it is (or is not)?
7. Will you feel a sense of pride and satisfaction in accomplishing this goal? How will that manifest?
8. Is attaining the goal in your best professional or personal interest and in the best interest of your organization? In what ways?

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

BUILDING RAPPORT

Rapport is the feeling between two or more people that they can relate to each other. Two people have established rapport when closeness, empathy, and mutual liking characterize their relationship. In the absence of rapport, people may show little interest in interacting spontaneously and enthusiastically with one another.

There are two ways to communicate with other people:

1. Emphasize the differences between you and other people; or
2. Emphasize the things you share.

If you emphasize the differences, you will find it hard to establish rapport. If you emphasize what you share, it is much easier to build rapport.

- ✓ **Be approachable** — If you are standing with your arms crossed and an ugly grimace upon your face, you will not have a chance to build rapport because no one will approach you unless they have to. If they do, they have likely already made a decision about you.
- ✓ **Make eye contact and smile** — When you make eye contact with a person, wait a second and then give them a big, warm, open lipped smile. The concept behind waiting is that you are letting this person know that you do not smile constantly, but rather you are smiling at them personally. Hold the eye contact (this does not apply in some countries where prolonged eye contact is considered rude; research is key if you are meeting someone from another culture).
- ✓ **Initiate conversation** — If the other person has not initiated conversation, *you* can initiate conversation. Remember to maintain a pleasant tone and a moderate speaking speed. Don't let nervousness speed up your conversation!
- ✓ **Be curious** — The idea is to keep the conversation going back and forth with each of you talking. No one person should dominate the conversation. Each person should be asking interesting and relevant questions.
- ✓ **Listen actively** — Listen actively to what a person says to you. Try to pick up on some subtleties here, as well as some of their common phrases. As they speak to you, make sure to keep your eyes on them (you can look away occasionally, DO NOT appear to be creepy) and nod your head to indicate you are listening.
- ✓ **Mirroring** — Mirroring is not mimicking. Mirroring means that you may use some of the words or phrases that the other person uses, or you may choose to position yourself in the same way the other person is positioned. When people use similar language — whether spoken or body language — the similarities foster rapport building.

Adapted from How to Build Rapport (Robert Mullis) and Maximizing Your Mentoring Relationships: Resource Guide (Susan Murphy, 2009)

SUPPORT, VISION, AND CHALLENGE

The mentor and student mentee work in partnership to make the mentoring relationship a success. Both the mentor and student mentee need to be aware of how the mentor will fulfill the mentor role (awareness of the process) and that the relationship is a partnership that the mentee must fully participate in to be able to grow and to develop.

The mentor's actions in enabling growth fall into three general areas: support, vision, and challenge. The mentor should periodically reflect on the questions posed below and share the answers with the student mentee so that the process of mentoring is transparent.

<p>Support</p> <ul style="list-style-type: none"> ● Listening ● Providing structure ● Expressing positive expectations ● Serving as an advocate ● Sharing yourself ● Making it special 	<p>What specific support can you provide to help your mentee grow and develop?</p>
<p>Vision</p> <ul style="list-style-type: none"> ● Modeling ● Keeping tradition ● Offering a map ● Suggesting new language ● Providing a mirror 	<p>In what ways can you help your mentee see, develop, and realize his/her vision?</p>
<p>Challenge</p> <ul style="list-style-type: none"> ● Setting tasks ● Engaging in discussion ● Setting up dichotomies ● Constructing hypotheses ● Setting high standards 	<p>What specific strategies can you use to challenge your mentee?</p>

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

ENABLING GROWTH: FACILITATING LEARNING

As the mentoring relationship gets off to a start, both the mentor and the mentee will be learning a great deal. For the student mentee, participation in a nursing program as an adult learner brings challenges that magnify the intensity of the undertaking. The mentor's role is to enable the mentee's growth and development by facilitating the mentee's learning.

In order to facilitate learning, the mentor's approach to the relationship should enable the student to move through the stages of learning, help the student grow through learning, and provide constructive feedback so that the student can reflect on and select new avenues and challenges that will help them keep up the cycle of growth and development.

STAGES OF LEARNING AND LEVELS OF COMPETENCE

It is helpful for both the mentor and mentee to understand not only the stages of learning as it relates to the student mentee's levels of competence as they move through the nursing program, but also the mentor's role during the stages of learning.

Level	Learners	Mentor's Role
Level 1: Unconsciously incompetent	Learners are unaware of what they do not know; or they may assume they know something when they really don't. Confidence exceeds ability	Support discovery of how much mentee needs to learn (blind-spot awareness)
Level 2: Consciously incompetent	Learners become aware of what they do not know (the gaps) and can articulate, "I don't know how to do that." Confidence drops	Encourage by helping mentee understand mistakes. Ask questions to deepen thinking. Facilitate application of new knowledge.
Level 3: Consciously competent	Learners want to take learning deeper. They know the information, process, and skill but need to carefully think through the process. Confidence rises.	Provide opportunities to practice. Offer feedback.
Level 4: Unconsciously competent	Learners know the information, process, skill, etc. and demonstrate competency at using it; but they no longer have to think through the steps. Confidence is demonstrated.	Engage in reflection on practice to facilitate continuous improvement. Watch for signs of complacency.

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

FEEDBACK

Phase	Key Components	Questions/Issues for your Mentee
Set the Stage	<ul style="list-style-type: none"> • Talk about the value of feedback. • Early on, create the expectation that feedback will be part of the process. • Ensure that feedback is provided on a regular basis. 	<ul style="list-style-type: none"> • What are your personal challenges? • What kind of feedback works best for you? • What areas do you expect or need to receive feedback in?
Give Feedback	<ul style="list-style-type: none"> • Wait until the relationship and trust have been established. • Allow sufficient time to provide effective feedback. • Ensure privacy. • Address positives as well as specific areas for improvement. • Think about their individual needs. • Link to their goals, organizational imperatives, and areas of self-development. • Allow opportunities for them to respond. 	<ul style="list-style-type: none"> • Is it the right time to give feedback? • Set a context by identifying the areas you want to focus on. • Direct your feedback toward something that is changeable. • Be specific and descriptive. • Be non-judgmental. • Be authentic. • Be respectful of different perspectives. • Check to ensure they understand. • Make eye contact. • Balance candor and compassion.
Ask for Feedback	<ul style="list-style-type: none"> • Listen and stay focused. • Avoid being defensive. • Ask questions for clarity. • Acknowledge the other person's point of view. • Summarize your understanding. • Incorporate insights into your next feedback. 	<ul style="list-style-type: none"> • Was my feedback helpful towards improving your performance? • What else might I have done to help make the feedback more useful for you?

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

Tips for Giving and Receiving Feedback

In the mentoring context, the mentor and student mentee can practice and refine giving and receiving feedback as the mentoring occurs and when they reflect on the mentoring relationship itself.

Feedback is information about past behavior, delivered in the present, which *may* influence future behavior. **The choice is always the receiver's as to what to do with feedback.**

Receiving feedback can feel threatening. We probably have memories about feedback from our childhood when feedback was “for our own good” given by somebody more powerful than us. You may receive thousands of instances of feedback every day, not all of it about you. Some of it is about what someone else thinks you are doing or wants you to be doing, or even who you remind them of!

Feedback can be a gift, however, and we need to ask for it in order to achieve growth. Asking for feedback can be difficult and takes some courage because we fear what we may hear. The following steps will help to ensure you receive useful feedback:

Ask • Listen • Thank • Reflect • Follow up

Giving effective feedback is hard work. The giver only perceives certain aspects of the receiver's behavior and organizes these perceptions in ways meaningful to the giver. The giver's feelings determine the style, choice of words, and emotional tone that comprise the entire feedback package. The fact is that we reveal ourselves by giving feedback. Receivers can usually sense the existence of hidden motives in feedback. Introspection and care are important. Although these warnings are about being careful about choosing to give feedback, the most common mistake is not giving feedback when you should!

Be clear — Why you are giving the feedback? For example, I want to improve our working relationship. Here is some information about what's getting in the way.

Be specific — Tell them what you perceive and the meaning you give to that perception. Tell them how you feel about what you perceive and how you feel about that feeling.

Speak to behavior — These are the objective things someone can choose to do something about. For example, “I notice that..., I saw you..., I heard you say...” Be direct and avoid preambles such as “I don't want to hurt your feelings.”

There are different types of feedback and they can be appreciative or constructively challenging:

Consider carefully what kind of feedback you are giving. Ask yourself what your intent is in giving it? Do you want to be helpful as a mentor, to deepen a relationship, or share a common experience?

What you are giving to the person receiving the feedback is your perception. Making the receiver aware of your perception gives that person insight into how not only you react, but how others may as well. The receiver can then use the information to adjust behaviors if they wish to. For this reason, receivers have more control than they realize.

For both the mentor and the student mentee, the following tips help distill general feedback knowledge into a format that can be used during mentoring:

FAST APPRECIATIVE or POSITIVE FEEDBACK (Frequent, Accurate, Specific, Timely)

- Provide feedback immediately or as soon as possible after the action has taken place. This is the “educable moment.”
- Provide specific details about what you observed that the mentor or student mentee did well.
- Show how behavior relates to the mentor’s or student mentee’s goals.
- Let the student mentee or mentor know that you appreciate the extra effort and good results.
- Praise “approximately right” behavior with learners.

FAST CORRECTIVE FEEDBACK

- Provide feedback immediately or as soon as possible after the action has taken place. This is the “educable moment.”
- Have the learner point out what s/he is doing well.
- Provide the learner with alternative behaviors.
- Make sure the feedback describes what the person is doing — that it’s about the activity, not critical of the person — and relate feedback to the goal.
- Whenever possible, provide corrective information before errors occur.
- End on a positive note in order to keep self-esteem intact.

Adapted from Maximizing Your Mentoring Relationships: Resource Guide (Susan Murphy, 2009)

MAINTAINING THE MENTORING RELATIONSHIP

Like any other kind of relationship, a mentoring relationship needs to be maintained. The skills and abilities needed to maintain a mentoring relationship are grounded in communication: building rapport, listening, resolving differences constructively, and reflecting on the mentoring process.

The mentor and student mentee should use the resources on the following pages to bolster their skills and abilities as they move through the mentoring relationship.

Listening

Excellent mentors actively listen, and mentees rank listening high among traits of ideal mentors. Unfortunately, people in mentoring roles often mistakenly rush to offer advice, provide suggestions and answers, or tell their own story without really listening to what their mentees' real concerns are. What can mentors do to show active listening?

- *Mentors can use non-verbal responses* (e.g., nodding, maintaining eye contact, smiling in conjunction with their verbal prompts to encourage the mentee to continue—such as “yes,” “tell me more about that,” and “uh huh”).
- *They don't interrupt* until the mentee has finished his or her presentation of ideas.
- *They let the mentee know what they heard by paraphrasing* what the mentee said.
- *Provide ideas or information* that the mentee can use to develop his/her own solution, when the mentee asks for your input.
- *Agree early-on how they will give advice.* Should it be given only when the mentee specifically asks for it? Or, would they be receptive to being asked “Could I give you a suggestion?” and waiting for the mentee to say “yes” before doing so.
- *State advice and feedback in the first person singular.* Many of us are tempted to start with “You ought to...” or “You should...” because everyone likes to give advice. Unfortunately these statements can raise defenses and cause resistance. Try “What I've found helpful...” and “What works for me...” By referring to ourselves, we don't sound critical or judgmental of the mentee. We're merely giving him or her the benefit of what we've learned or experienced, not telling the mentee what he/she should do. Adults seldom want to be told what they should or shouldn't do or how to do it, but an idea or a bit of information offered in a neutral way becomes something they can identify with and use.
- *Let the mentee know which emotions you're sensing* from the mentee (“you sound frustrated,” or “you sound upset,” or “you sound disappointed”).

- *Seek to understand.* Direct communicators use “Why?” to help them get the picture. However, many women and some men are indirect communicators. “Why?” instantly puts an indirect person on the defensive. He or she may feel judged and vulnerable when queried in this manner. If, as the mentor, you are curious, try: “Help me understand...” This can be much less disconcerting.
- *Some other useful questions the mentor might ask:*
 - “What have you learned about your project that you didn’t expect to learn?”
 - “How is this project different from the last one you managed?” “How is it similar?”
 - “If you could handle that situation again, what would you do differently?”

Adopted from Maximizing Your Mentoring Relationships: Resource Guide (Susan Murphy, 2009)

Resolving Differences

Is there a problem? Mentorships are special relationships, and because they are subject to human foibles, they sometimes do not work out as planned. How do mentors and mentees know when their relationship is in trouble?

Three warning signs are:

1. The mentor or mentee does not believe some of the important developmental or professional needs are being met.
2. The mentor or mentee senses that the cost of the relationship outweighs the benefits.
3. The mentor or mentee feels distressed or harmed by the relationship.

What is the conflict about? The first step for the mentor and student mentee, should they feel something is not working in the mentoring relationship, is to reflect on the issue and see if they can resolve it with these resources. If not, then the mentor and the student mentee should approach the mentoring program liaison.

In determining if they can resolve the conflict, the mentor and mentee should look at what kind of conflict they are having — content or relationship conflict. One of the most common reasons that disagreements evolve into conflict is because we confuse conflicts over actual content — a real issue — with conflicts having to do with the relationship between the two people in disagreement.

A content conflict involves a disagreement about something tangible — a specific and measurable fact like the distance from one city to another, the number of ounces in a pound, or the percentage the phone bill was hiked.

A relationship conflict centers around what’s occurring between two people on an interpersonal level — their feelings, emotions, and perceptions. Relationship conflicts occur when someone

believes, for example, that the other person is disregarding him or her, or is not respectful of him or her.

How can we resolve the conflict? Conflict really means that differences have come up. Not all differences are necessarily negative (e.g., I like coffee, my mentor likes tea). When differences involve emotional reactions, then they can turn into what is commonly considered conflicts between personalities.

Steps for Resolving Conflict

1. Focus on the problem or issue, not the person.
2. Maintain self confidence and self-esteem of the other person.
3. Maintain a positive and constructive relationship.

When dealing with conflict, it is important to determine exactly what the conflict is as well as the outcome you desire. Conflict between mentors and mentees usually arises from misunderstanding, misinterpretation, miscommunication, or differing opinions.

It is also important to understand the difference between conflict and personal attacks. Conflict is a natural result of two unique individuals interacting and challenging each other, especially in a development environment, and has positive benefits.

Personal attacks are when differences shift from the issue or opinion, causing the conflict to the personalities or individuals involved. Personal attacks are usually highly volatile because they are emotionally driven (by anger or frustration) and based on perceptions about someone's character or motives. When conflict manifests into personal attacks, the original issues are no longer the problem because the conflict has ceased to be rational and has now become personality-centered. **Outside assistance should be considered when this occurs in mentoring relationships.**

To successfully manage conflict you need to be able to:

- Develop a supportive rather than defensive environment.
- Clearly understand what you want to happen.
- Explicitly express why you feel there is conflict.
- Listen openly and accurately to feedback.
- Check the meaning behind the messages you are giving and receiving.
- Seek to identify a common goal through compromise.
- Discuss the issues (use facts rather than opinions).
- Stay solution-focused.

What to do:

1. Take time to reflect before resolving a conflict. Conflicts do not have to be resolved in the moment, particularly if there are emotions involved.
2. Write down what you think the area(s) of conflict are. Be clear and specific.
3. Write down why you think these are area(s) of conflict. Identify the other person's perspective (be prepared to ask for this if you don't know it) and how it differs from yours.
4. Prepare for your conversation. Set a supportive climate. Do not be defensive.
5. Be prepared to listen. Use active listening techniques: paraphrasing, clarifying questions, etc.
6. Be prepared to move forward in a healthy, positive way.
7. Determine how future conflicts will be addressed.

Adopted from Maximizing Your Mentoring Relationships: Resource Guide (Susan Murphy, 2009) and The Elements of Mentoring (Brad W. Johnson, 2004)

Reflection and Accountability

While communication is THE key to the mentoring relationship on an ongoing basis, the mentoring relationship itself needs to be tended to from time to time. Periodic reflection about the relationship allows the mentor and student mentee to fine-tune how they work together so that the student mentee gets the support he or she needs.

Use the Mentoring Partnership Accountability Tool on the next page to conduct periodic evaluations that the mentor and student mentee agreed upon in the mentoring agreement. The reflective evaluation can be used over and over throughout the course of the mentoring relationship.



MENTORING PARTNERSHIP ACCOUNTABILITY TOOL

Instructions: The mentor and student mentee should each review these questions and prepare their reflections prior to meeting to discuss how the mentoring relationship is working.

Mentor: Mentee: Date:	Always	Most of the time	Some of the time	Never	Comments
1. We meet regularly.					
2. We do a good job of communicating schedule changes that may affect mentoring meetings.					
3. We notify one another if we cannot follow up or honor our commitments to each other.					
4. We eliminate outside influences and distractions when we meet.					
5. We honor our mentoring agreement, including regular reflective evaluations.					
6. We check out our assumptions.					
7. Our communication is clear and misunderstandings are infrequent.					
8. We have identified sufficient and varied opportunities for learning through the goals we set (Do we need to do more or reset the goals?).					
9. We have put in place a variety of mechanisms to ensure continuous feedback.					
10. Feedback is given candidly, thoughtfully, and constructively.					
11. We are making progress toward achieving the SMART goals that we set.					

12. We provide feedback regularly and make sure it is two-way.					
13. Our meetings are relevant, focused, and meaningful.					
14. We acknowledge and address conflict when it occurs.					
15. We are conscientious about safeguarding confidentiality.					
16. As the mentor, I am providing adequate support to facilitate learning.					
17. As the mentee, I am receiving adequate support that is helping me learn and grow.					
18. We are continuing to work on maintaining the trust in this relationship.					
19. We are continuing to build and maintain a productive relationship.					
20. The quality of our mentoring interaction is satisfactory.					
21. We are continuously working on improving the quality of our mentoring interaction.					
22. There are things that we avoid discussing during the mentoring relationship (Do we need to address them? Are there any stumbling blocks that we need to address together or with help?).					

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011) and The Mentee's Guide: Making Mentoring Work for You (Lois J. Zachary, 2012)

CLOSING THE MENTORING RELATIONSHIP

As the English proverb so eloquently puts it, “All good things come to an end.” So too, the mentoring relationship will come to a close. Set a specific meeting to bring the relationship to a close at the end of the program.

Prior to the closing meeting, both the mentor and student mentee should reflect on the following questions so that they can share what the relationship fostered for each of them.

CLOSING REFLECTIONS

Instructions: Prior to meeting for the last time, the mentor and student mentee should each take time to reflect on the questions below with the goal of sharing the responses with each other. Answers will show the impact of the mentoring relationship on each participant and will formally close the mentoring relationship.

What did I learn from this relationship; what is my learning conclusion?

A learning conclusion is a highly focused conversation about the specific learning derived from the mentoring experience. It is a no-fault conversation focusing on both the process and the content of the learning.

- Were the learning goals realized?
 - If yes, what did you learn as a result of reaching your learning goals?
 - If no, what got in the way? What do you need to do to reach them?
- What else do you need to learn?
- What worked well for you in the relationship?
- What did you learn as a result of the process?
- What did you learn about yourself as a learner?
- What did you learn about mentoring? About being a mentor? A mentee?
- What would you do differently next time?

Have I integrated my learning?

Integrating learning means applying and integrating what you have learned as a result of the relationship—taking it to the next step and leveraging your learning.

- How you will apply what you’ve learned?
- What you will do as a result of what you’ve learned?
- What action steps you will take?

How will I celebrate my learning success?

Celebration is a fundamental part of concluding a mentoring relationship. It reinforces learning and signals the transition process which redefines the relationship.

- What are meaningful ways to celebrate what you've accomplished?
- How will you express appreciation as part of the celebration?

How will we redefine the relationship?

Redefining the relationship is an important step. Your relationship with your mentoring partner will be different once the mentoring relationship ends. You may decide to continue the relationship on an ad hoc basis or informally. Be proactive and talk about these changes before they take place and then move on.

- What kind of relationship would I like to have going forward?

MOVING ON

Once you have redefined your relationship, it is time to “let go” of the relationship as it was and embrace it as it will be.





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