



Mentorship Handbook

Acknowledgement

The following handbook was adapted, with permission, from the Association of Professional Engineers and Geoscientists of Alberta’s mentoring handbook—*Strategies for the Success in Mentoring: A Handbook for Mentors and Protégés*.

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CHAPTER 1 – About Our Program

Purpose

The purpose of the Mentorship program is to facilitate the exchange of knowledge from a more experienced accounting professional to a less experienced accounting professional and registered accounting students. There are two program options in which one can join:

1. Foreign-Trained Professional Mentoring Program

This program focuses on assisting Mentees, who are internationally trained professionals, navigating through unique challenges and obstacles as they establish their careers in Alberta. The program focuses on the development of soft skills, workplace/employment skills, and the clarification of cultural norms and expectations, with the overarching objective of facilitating career progression. Mentors do not necessarily have to possess similar backgrounds as the Mentee.

2. Career Development Mentoring Program

This program focuses on assisting CPAs in developing a relationship that can yield insights and opportunities to expand one's knowledge of career options, develop or improve upon work-related soft-skills for career progression, and/or to achieve meaningful goals. Mentors provide advice and guidance, as well as share relevant knowledge, perspectives, and experiences with the Mentee.

Guiding Principles

- **Duration:** The duration of the program is one-year (the Mentor and Mentee are free to continue the relationship past one year, but this would be exclusive of any involvement of the CPA Alberta.
- **Minimum Time Commitment:** Over the course of the one-year commitment, the parties will agree to interact for a recommended 12 to 24 hours. Actual hours may vary, depending on the agreed relationship commitment. These hours could be completed in-person, over the phone, or through email or other electronic means. The maximum commitment is unlimited and at the discretion of the Mentor/Mentee.
- **Matching:** Mentors and Mentees will be matched on the basis of responses provided in a questionnaire that is completed upon registration. This questionnaire provides the individual's match preferences, employment background, self-assessment of various soft skills, and goals.
- **Mentor Responsibilities:** Mentors should plan to share their knowledge, experience, and approaches to help the Mentee attain the skills needed to succeed in their career. Mentors are required to attend a training session prior to being paired with a Mentee.
- **Mentee Responsibilities:** It is the Mentee's responsibility to initiate contact with the Mentor after the pairing has been made. Mentees should prepare for each meeting, ready to discuss topics and ask questions, thereby ensuring that the process is productive. Mentees are required to attend a training session prior to being paired with a Mentor.
- **Potential Relationship Problems:** In the event the current partnership proves to be unsuccessful, and attempts to salvage the relationship are ineffective, the relationship can be dissolved and either party may ask to be re-matched.
- **All participants are advised that this is not a job placement service.** If a Mentor feels that their Mentee is only interested in securing a job, please inform us at: mentorship@cpaalberta.ca.

- **Limits to the program:** Only a limited number of Mentor/Mentee pairings are made each year, based on the applications received. While all applications will be accepted, individuals will only be contacted when a suitable Mentor/Mentee pairing is available.
- **Privacy:** CPA Alberta uses your personal information for the purpose of; assessing suitability for the mentorship program's volunteer opportunities; to plan training; to manage the pairing of Mentors and Mentees; to maintain a database of matching areas of expertise and interest for the mentorship program; to operate the CPA Alberta's mentorship programs; and to communicate with you about the program and its activities. We store the personal information provided on secure computer systems with access controls or in locked filing cabinets. The handling, collection and retention of personal information is governed by our privacy policy, the *Personal Information Protection Act* (PIPA) and the *Chartered Professional Accountants Act* (CPA ACT).

Prior to confirming eligibility to participate in these programs, we will ensure that all Mentors and Mentees that are registrants in good standing of the CPA Alberta legacy organizations.

You may choose to withdraw from the program at any time by contacting our office.

CHAPTER 2 – Core Skills for Successful Relationships

Core Skills Used in Mentoring Relationships

There are specific core skills that everyone should use in a mentoring relationship. They are listed below.

Listen Actively

Most of us have never been trained in how to listen to other people. While we may think we are pretty good listeners, most people don't listen as well as they could. Some common traps and tips to include:

- **Listening only to respond.** Stay focused on what the speaker is saying until it is your turn to talk. Don't formulate your answer until they are finished, or you'll miss the end of their statement.
- **Making assumptions.** Check out what you have heard. You do this by playing back or summarizing, in your own words, what you think the other person has said. You might say, "So you think your boss doesn't like you. Is that right?" or "So you feel that I should take a course in Effective Technical Writing?" Check to see if you understand how the other person feels. You might say, "You sound really frustrated or hurt" or "You sound frustrated with me" if you have truly heard each other, you will notice how relieved the other looks when you affirm what you hear or sense. Confirmation is a powerful thing.

Question Openly

Most of us do not excel in asking questions because we tend to ask questions that solicit a "Yes/No" answer (CLOSED QUESTION). It is better to ask questions that give the person a chance to expand on the subject or their opinion (OPEN QUESTION). An example of a closed question might be to say, "Do you like your job?" To turn that into an open question you might say, "How do you feel about your job?" Learning to ask open questions often enables you to understand others better.

Read Body Language

Sometimes body language says much more than words do. Some common examples of body language and their interpreted meaning are:

- Looking away – avoiding eye contact may mean discomfort, upset, disagreement, embarrassment
- Crossed arms – anger, defensiveness, closed to the other's opinion
- Head in hands – fatigue, upset
- Moving backwards, tilting chair back – feeling space invaded
- Fidgeting, foot tapping – anxiety, boredom
- Hands covering eyes or mouth – sadness, shame

However, sometimes these cues are cultural. For example, avoiding eye contact is a sign of respect in some cultures. So while it's important to pay attention to body language, it is also important to pay attention to the fact that the message being interpreted may not be the message that person wanted to send.

Avoid Communications Roadblocks

Some communications styles tend to get in the way of good interaction, for example:

- Ordering – telling someone what to do
- Threatening – telling someone that there is only one course of action, i.e., "If you don't pay attention to this problem, I will stop seeing you."
- Preaching – telling someone how to behave
- Avoiding – trying to avoid an uncomfortable situation in the hope it will just go away
- Pacifying – trying to make someone feel better without having solved the problem
- Lecturing – giving someone unsolicited advice

Build Trust

The following suggestions may help you develop rapport and build trust:

- Call just to talk
- Pick a good place to meet away from your offices
- Help each other prepare and offer suggestions
- Prepare yourself
- Be on time
- Set a comfortable tone

Things to Be Aware of:

Not everyone is suited to being a Mentor or a Mentee. The Mentor and Mentee sections of this guideline outline desirable attributes or competencies that are specific to either Mentor or Mentee. The following are concepts that both Mentor and Mentee should keep in mind.

Focus

In the context of the CPA Alberta program, a mentoring relationship does not exist to develop the Mentee's technical skills. Any technical content should, at most, be a very minor component of the relationship.

Control

The Mentee should manage the relationship. After all, it is the development of the Mentee that is primarily at stake. That is not to say that the Mentor does not have any input, but the Mentee must be the one who takes responsibility for the process and outcomes. Mentor should facilitate the Mentee's development based on the Mentor's own professional experience.

Time

Good mentoring takes time – time spent in active discourse and time preparing for meetings. It is recommended that the Mentor and Mentee be prepared to commit to a minimum average of two hours per month for mentoring activities, including preparation and review.

Access

The Mentee must be able to contact the Mentor easily. Mentors must respond in a timely fashion. Mentees may need a few moments of their Mentor's time on short notice. An important component of professionalism is the respect for the time of others. Define reasonable limits and identify demands that are excessive or unreasonable.

Intimacy

A good mentoring relationship promotes trust and open, honest, meaningful communication. Maintaining professional boundaries is important.

Sensitivity

Be sensitive to cultural and gender differences. One of the goals of this handbook is the acclimatization of a great variety of individuals into the professional and personal culture of Alberta and Canada. This does not negate the rights of individuals to their gender or culture, however different from your own. Some of the most effective Mentee/Mentor matches involve very different individuals.

Differences in culture

While this often refers to differences in personal culture, it can also be applied to differences in professional or corporate culture. The Mentor and Mentee must both be aware of these differences and respect them. Differences in corporate culture are especially important when the Mentor and Mentee do not work for the same employer. In that situation, the Mentor must be sure to take differences into

account when dispensing advice.

Confidentiality

In order for a mentoring relationship to succeed, it must be completely confidential. This is especially important when the participants work for different organizations. Any information that either the Mentor or Mentee receives about the other organization must be kept confidential and not be relayed to their co-workers or exploited for personal gain. Before a cross-organizational mentoring relationship is established, both participants should fully disclose their intentions to their respective employers. It is important to remember that, in the CPA Alberta context, a mentoring relationship does not exist for technical reasons. Its purpose is to aid the Mentee in developing other career skills. Any technical content should be, at most, a very minor component of the relationship. Technology transfer works much better in a coaching relationship.

Cloning

The purpose of a mentoring relationship is for the Mentor to facilitate the Mentee's development based on the Mentor's greater experience. It is not for Mentors to mold their Mentees into duplicates of themselves. Mentees must be allowed to develop in their own ways. A Mentor can make suggestions about what might best be accomplished but the final decision must be left to the Mentee.

Terminating the Mentoring Relationship

This important issue needs to be discussed early in a mentoring relationship. How will the participants know when the relationship has reached its conclusion and should be ended? How will the relationship be ended? Clear, early definition of this issue will ensure that there are no guilty or hurt feelings on either part when the mentoring relationship does end. As mentioned in Chapter 1, the CPA Alberta mentoring relationship should last one year. A contract is given in Chapter 8 to provide a formal guideline for creating this important document.

CHAPTER 3 - Attributes of a Receptive Mentee

Being involved in a mentoring relationship requires effort. Anyone who wishes to improve their skills through the use of a Mentor should consider these issues.

Willingness to Learn

Successful Mentees must have a willingness to learn from their Mentors. A mentoring relationship is interactive and requires the Mentee to be committed to setting goals and working toward specific learning objectives.

Willingness and Ability to Self-Evaluate

Mentees need to be able to assess their skills objectively and evaluate potential opportunities for self-development. They should have a personal vision, specific career/life goals and a good grasp on current career realities. This self-evaluation is required for the Mentee to set objectives within the mentoring relationship. Before asking for help, Mentees should know their tentative career/life goals, their strengths, the development they need and the *specific* assistance they would like. The more they understand about themselves, the more accurately they can present their goals to their potential Mentor. Some ways to demonstrate their ability to evaluate their skills include:

- Understand what is important to them, what they value and what they desire most;
- Recognize areas which they perform well in, find concrete examples of behaviors they can perform at a good-to-excellent level;
- Identify specific weaknesses or areas in which others have indicated that the Mentee needs to grow and develop;
- Set tentative one-to-five year goals for both personal and professional lives; and
- Describe accurately the reality of work situations in which they are involved.

Learning Style

Different people learn new ideas and concepts differently; for example, some people learn through verbalization and others through reflection.

Since mentoring is a tool for learning, it is important for Mentees to understand how they learn so they can evaluate whether mentoring is an effective learning tool for them. If mentoring is right for them, knowledge of their learning style will be helpful in working effectively with a Mentor.

Time

Building a mentoring relationship takes time. Good Mentees recognize that a Mentor's time is valuable and ensure that they adequately prepare for each face-to-face meeting. It is recommended that Mentees be prepared to commit a minimum of two hours every other week, in addition to the time for meetings, for mentoring activities, including review and preparation. Time management is an acquired skill that comes with experience, but can be augmented with appropriate time-management training. If Mentees have difficulty meeting the time commitments of the mentoring relationship, they could ask the Mentor for advice and ask their supervisor about professional development opportunities.

Commitment and Building Trust

Mentees must be committed to achieving the objectives of a mentoring relationship. Persistence is an important part of the process. The more the Mentor is able to trust in the Mentee's ability and willingness, the more committed he will be to the partnership. This trust develops over time as the Mentor observes appropriate behaviors on the part of the Mentee. To become trustworthy, Mentees must:

- Keep confidences shared with their Mentor;
- Spend quality time together;
- Refrain from criticizing their Mentor to others;
- Respect boundaries set by their Mentor;
- Admit errors and take responsibility to correct them; and
- When they disagree with their Mentor, tactfully explain why. It is not productive to be a "yes-person".

Listening Actively

Active listening is an important skill for both Mentors and Mentees. When Mentees listen well, they demonstrate to their Mentors that they are interested and understand what they are saying.

Mentees can demonstrate their active listening by:

- Showing interest with encouraging responses such as “hmmm...” and “yes...” or by paraphrasing certain comments in their questions to show they understand;
- Using nonverbal signs of understanding, such as nodding their heads, leaning forward, and smiling;
- Avoiding the interruption of others when they are talking;
- Showing interest and remembering comments made in previous meetings; and
- Summarizing key elements of conversations as the meeting draws to a close.

Self-Confidence

A Mentee needs to have the self-confidence to approach potential Mentors and effectively present the potential merits of mentoring relationships. One very important part of self-confidence is the ability to encourage others. This includes giving their Mentors recognition and sincere positive feedback. There are many different kinds of feedback and Mentors vary in the amount and kind of encouragement they feel comfortable with, for example:

- Compliment the Mentor on known accomplishments;
- Point out positive traits such as perseverance and integrity that have been observed;
- Praise the Mentor privately;
- Write an encouraging e-mail or leave a complimentary voice mail; and
- Express thanks and appreciation and let the Mentor know how suggestions have been applied or ideas used.

Confidentiality

The Mentor will expect, and the relationship demands, that the details and particulars discussed with the Mentor be kept in confidence. Any situation involving a risk to the public would override this expectation. In mentoring situations in which email must be used because of distance, it is very important to ensure the email messages go only to the Mentor. Mentees should consider setting up a password on their mentoring e-mail and should be sure that mentoring letters cannot be opened in error by someone else in their office.

CHAPTER 4 – Mentee Worksheets

Worksheet 1 – Mentee’s Personal Evaluation

Before starting a new relationship, it’s a good idea for Mentees to step back from their day-to-day life and ask themselves questions such as “Where am I? How am I doing?”. This activity will also help them get feedback from their Mentor on how she/he sees them. They should be sure to complete this exercise before the first meeting. The Mentor will be doing a similar exercise in preparation for the meeting.

Instructions

The purpose of this tool is to help you get a real picture of where you are. The more honest you are, the more you will see yourself reflected in the answers in the exercises below:

- 1) What are my top five strengths as a person—the top five things I feel good about and am proud of?

1. _____

2. _____

3. _____

4. _____

5. _____

- 2) What are the five areas in which I could improve as a person—the five things I most want to work on or improve about myself?

1. _____

2. _____

3. _____

4. _____

5. _____

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

1. _____

2. _____

3. _____

4. _____

5. _____

4) What are the top five threats I'm facing right now—well-defined threats in the world that could keep me from achieving my dreams?

1. _____

2. _____

3. _____

4. _____

5. _____

5) What are the five most important things I can do over the next six months to build on my strengths and overcome my challenges?

1. _____

2. _____

3. _____

4. _____

5. _____

Worksheet 2 - Mentee's Checklist: Are You Ready to Find a Mentor?

Before proceeding with any mentoring relationship, the Mentee should consider the following points. It is appropriate to review this list from time-to-time during a mentoring contract in order to review your commitment.

- I am committed to using the experience of my Mentor and to accepting the insights that s/he believes could assist me.
- I am committed to improving my skills in order to meet the goals I have set.
- I am committed to working with my Mentor for the time/frequency agreed upon in the mentoring plan.
- I am open to learning and receiving feedback from my Mentor.
- I am interested in learning from someone whose background and experiences may be different from my own.

Worksheet 3 – Creating a Personal Vision and Mission Statement

Creating a Vision

It is not always easy to set goals. Most of us know we want to be successful, but we often fail to determine what is needed to become successful. The first step in setting goals is to find a quiet place where you can sit and consider the future. Think about where you can realistically expect to be in three to five years. Place these expectations in one column and then list what you must do to meet the expectation beside it. Here are some questions that may help to get you started:

- What are my strengths?
- What are my major needs?
- What are my short-term career objectives?
- What are my long-term career goals?
- What do I bring to the table?
- What are the most important things I should be accomplishing in my job?
- Do I feel successful at my job at this time? If not, what is preventing me from succeeding? (if working)
- What do I like best about my job? (if working)
- If I could add variety, autonomy, and importance to my job, how would I use them?
- What have been the most significant learning experiences in my career?
- Would I benefit from any particular type of training?
- How do I learn best? (from doing, watching, listening, experimenting?)
- What do I think most hinders my success?
- What scares me?
- What makes me want to learn more?
- Which talents do I lack?
- What is the toughest stretch for me?
- What is my most satisfying success?
- What is my most disappointing failure?
- If I had a Mentor, what are the most important things that person could help me with?

Creating a Mission Statement

Now that you have taken the time to answer some fundamental questions about yourself, see if you can create a mission statement for yourself. Remember that major corporations spend thousands of dollars to have consultants help them develop the “perfect” mission statement. What you create may not be perfect, but it will reflect how you are thinking today. You can always update your mission statement in the future.

A personal mission statement explains who you are and who you want to be, and what you represent. You can use it to guide you when making choices and decisions, large and small, by asking yourself if that choice or decision helps you become who you want to be. A personal mission statement also helps you explain who you are to others.

A Two-Step Approach

A personal mission statement should answer three questions:

- 1) What is my life about: what is my life’s purpose?
- 2) What do I stand for: what are my values?
- 3) What accomplishments am I working toward that will help me fulfill my life’s purpose in a manner consistent with my values?

Step 1: Clarifying Purpose and Values

A. Write a list of at least 20 talents you have.

B. What excites you about your life? About the world? What angers you about your life? About the world?

C. What would a really good day be like for you? Where would you be? What would you do? Imagine anything—it doesn't have to be true.

D. Imagine that today is your 60th birthday, and a reporter is writing a story about what you have done. What would you hope people (your friends, the people you work with, family members) would say about you to the reporter? What difference would you hope you had made in their lives? How do you want to be remembered?

E. Imagine yourself at 100 years old, surrounded by your loved ones—talking with them in a comfortable, relaxed setting. These people have gathered to learn from you and your wisdom. What would you tell them is important in life? Looking back on your life, what really matters to you?

Step 2: Drafting a Mission Statement

Look over what you've written during Step 1. Then look again at the three questions a mission statement should answer. Consider how they fit together and how they can lead to a conclusion.

Write a rough draft of your personal mission statement. It should be brief but should still express who you are. When you read your personal mission statement, you should feel something, like "yes, that's who I really am!"

My Mission Statement:

Keep your draft personal mission statement with you and look at it several times during the day. See how it makes you feel. You may want to bring it to the next several meetings with your Mentor to talk about it and see if you want to change it.

Worksheet 3 – Setting Goals and Objectives

Before you can have that very important first meeting with a Mentor, you need to be able to tell the Mentor what you want from him/her. If you know what your goals and objectives are, you will be able to explain what you want and need from a mentoring relationship.

There is an old saying, “If you don’t know where you are going, any road will do.” Unfortunately, most of us have never been taught how to set goals or to develop personal mission statements.

Writing Goals:

Goals define the direction in which you are headed over the next several years. They are not short-term. It may take months or even years to reach them and they may not be clearly measurable. For example, you may set a goal of improving your cardiovascular fitness. You may be thinking about education or perhaps have a goal of getting a Masters degree.

Here are some of the kinds of goals a young professional like you might be interested in setting.

- Career – where do I want to be in my career in five years?
- Art/Music/Creativity – what goals do I have for my creative side?
- Education – where do I want to be in several years in terms of my education?
- Relationships – three years from now, what do I want my relationships to be like? Do I want more friends? More time with family? A better relationship with my family? To be married? To be single?
- Spiritual – what kind of spiritual growth or involvement do I see for myself over the next few years?
- Sports/Fitness/Health – if I am successful, what will my health and fitness be like several years down the road?

Example: One person might write: Three years from today, I will be:

- Finishing my Masters degree
- Working at the company of my dreams
- Working out – more fit
- Active in doing community service

Writing Objectives

Objectives are smaller steps that you take to make progress towards your goals. To be useful, objectives must answer the questions “what will change, by how much and when?”.

In order to create the kind of life you want, it helps to have a clear picture of where you are headed—your personal mission. It is equally important to make a plan on how to get there—how to make your dreams come true, one day at a time. By writing down goals and objectives for yourself, you are taking a big step toward making them happen. The next step will be to actually do these things and keep a record of your accomplishments. This is something you and your Mentor can work on together over time.

Usually objectives work best when they within a two month to year timeframe. It’s hard to know what will change beyond a year, so it’s hard to set realistic objectives for longer periods.

Example

Let's say you are interested in attaining an MBA while you are working full time. Some good objectives might be:

- Talking to a guidance counselor about requirements for admission.
- Determine what I need to do by _____ (date).
- Discuss your goals with your supervisor and ask his/her opinions on how to succeed.
- Read at least _____ (number) books on the subject by _____ (date).

Write down the goals and objectives that you have been thinking about in the following space. Any goal or objective that is written down has at least a 50 per cent greater chance to be achieved than something that just passes through your mind.

Goal: _____
Objectives: _____

Goal: _____
Objectives: _____

Goal: _____
Objectives: _____

Goal: _____
Objectives: _____

Goal: _____
Objectives: _____

Keep this sheet of paper handy. Look at it often and add to it as your understanding of yourself develops. Your goals and objectives may change on a daily basis, depending on the situation. If you keep track of the changes, you can see yourself grow.

Here's a tip on how to test if your objectives are solid: ask yourself, are they "SMART?" SMART stands for:

- “S”pecific – do I know precisely what has to happen?
- “M”easurable – how will I know if I've achieved this objective?
- “A”ttainable – is it realistic or do-able?
- “R”esult-oriented – will it really move me toward my goal?
- “T”ime-limited – does it have a due date?

If your goals are **SMART**, they're solid.

Worksheet 4 – Mentee’s Checklist of Tasks

The following are suggested tasks or activities you can complete as you work with your Mentor. They are suggestions only; tailor the list to your needs, your style, and your Mentor’s style. One way to use the list is to check the tasks you plan to do (left box), then check it off (right box) as the task is completed.

Step 1: Preparing for the Partnership

Plan to Do – Done

1. Read through all available materials on mentoring. Check the library and internet.
2. Review your past mentoring experiences for insights to use in this new mentoring partnership.
3. Talk with your manager about your participation in the program, your goals, and ideas for development activities (if applicable).
4. Complete any mentoring program application procedures.
5. Attend any seminars or other training events available for mentoring.
6. Prepare Goals and Objectives from the materials in Chapter 4.
7. Design a Potential Contract based on the guidelines given in Chapter 8 or use the model.
8. Think through how you would like your mentoring partnership to operate, including any limits to set (e.g., maximum amount of time you or your Mentor can spend).
9. Keep a log or diary of your interactions with your Mentor. Include notes on knowledge or skills gained and commitments made. A logbook is provided in Appendix A.

Step 2: Implementing the Mentoring Partnership

Plan to Do – Done

10. Meet with your Mentor by phone or in person at (time, date, location).
11. If possible, obtain more information about him or her prior to the meeting.
12. List goals for your development.
13. Be ready to share with your Mentor any feedback you received on your strengths and areas for improvement.
14. Be prepared to discuss the mentoring partnership in detail, including:
 - What you would like to receive in knowledge, skills, and resources;
 - The roles each of you will carry out;
 - Any limits (e.g., maximum time you have available) you must set for the partnership;
 - Times to meet in person and by phone;
 - The anticipated length of the mentoring partnership (12 months unless you agree to terminate sooner); and
 - The date of your next meeting.
15. Make changes, as appropriate, in your development plan.

16. Wait for your Mentor to introduce you to people who may be helpful to you. Ask for specific ways you should (and shouldn't) approach these individuals.
17. Study and be prepared to discuss resources loaned to you by your Mentor. Keep track of them in your logbook.
18. Exchange information with other Mentees.
19. Continue to meet in person or on the phone with your Mentor on a regular basis.
20. Follow through promptly on every commitment you make to your Mentor. If you're delayed, let your Mentor know the reason immediately.
21. Agree to contact and get assistance from individuals suggested by your Mentor. Let him or her know how these interactions turn out.
22. Learn directly from your Mentor:
 - Ask your Mentor to relate his or her "career story" including how decisions were made
 - Ask about specific techniques your Mentor has used to work with clients, customers, colleagues, and others
 - If appropriate, observe your Mentor performing the skills you want to develop
23. Ask for constructive feedback on your ideas and performance.
24. If appropriate, ask specific questions about the organization, including policies, procedures, culture, and politics.
25. Ask for coaching on a presentation you must make.
26. Complete evaluation activities:
 - Complete reviews sent via e-mail from the mentoring coordinator.
 - With your Mentor, discuss what you both concluded from the review, including any improvements you would like for the remainder of your mentoring relationship.
27. Regularly show appreciation for your Mentor's time and interest.

Step 3: Reviewing Accomplishments and Taking Next Steps

Toward the end of your agreed-upon time period, reflect on what you've accomplished over the entire period.

Plan to Do – Done

28. Complete final evaluation activities.
 - Complete Mentoring Experience: Final Review.
 - Meet in person or by phone with your Mentor to discuss the status of your development activities and goals, your partnership, and any “unfinished business.”
29. Follow up your closure meeting with a note or letter of thanks.
30. Complete any program closure activities.
31. Continue to touch base with your Mentor in the future.
32. If appropriate, seek another mentoring partnership.

Revised (with permission), from Phillips-Jones, L. (2000) *The Mentee's Guide: How to have a Successful Relationship with a Mentor* . (With permission.) (CCC/The Mentoring Group. 13560 Mesa Drive, Grass Valley, CA.

Worksheet 5 – Planning the First Meeting

Before you undertake anything significant in your life that's new, it is important to do some planning. This worksheet walks you through some steps to plan a first meeting with your Mentor. Your Mentor should be creating a similar worksheet; you may want to send your version of this worksheet to your Mentor so you are both prepared for your first meeting.

Basic Background Information

My Mentor's name is: _____

Nickname (if any) _____

Phone number(s) _____

E-mail address _____

Best time to call _____

What would I like my Mentor to call me? _____

Preparing for the First Meeting

Typically, first meetings allow two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan some conversation starters, knowing that these are tools if you need them.

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

- 2) What are some things I could tell my Mentor about myself that would help us get to know each other a little bit? What about me and my life story might be interesting and relevant to this Mentor?

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

4) What do I want out of the mentoring relationship? What are my hopes?

5) How can I find out what my Mentor hopes to get out of the relationship – what questions might I ask?

It is recommended that you look over your answers to this planning sheet shortly before your first meeting. You might even bring it along to offer it as a bit of a roadmap for you both to follow. Use your judgment, but remember to look your responses over before the meeting – this will make you more comfortable and relaxed. The results of your first meeting will have an important place in your mentoring logbook (Appendix A). Do not forget that you must keep track of this and all other meetings.

You should have prepared a preliminary Development Plan to go over during the meeting. Be careful to listen to how your Mentor responds to your preparation. Ask them about the strengths or weaknesses of the plan. What does he think you need to work on? Can the Mentor see opportunities for growth within your career?

CHAPTER 5 – Attributes of a Mentor

A Mentor is someone who can help develop others and help them integrate into new situations. This usually means that the Mentors have experience and are willing and able to spend time and effort to develop talent in others. As a part of their mission, Mentors give advice, but it is not the role of the handbook to tell you how to give advice. What is important is how the Mentor can act as a catalyst with the Mentee.

The purpose of this section is to distinguish and dramatize the skills of the Mentors—the probes, the challenges, the inquiries and the provocative questions that will inspire thought, stimulate reflection, tap discovery and generate new aptitudes in a Mentee.

Benefits to Mentoring

The reason most given by individuals who become Mentors is that they wish to give something back to their community. Another common reason is that Mentors feel that they are contributing to the future of our profession and society. Mentoring less experienced persons provides them with many benefits, from improved work habits to enhanced self-image. Research shows that mentoring really helps both parties.

Experienced Mentors report that they actually feel that they get more out of the relationship than they give. While the benefits of mentoring are as diverse as the people who Mentor, here are a few. As a Mentor you will be:

- Making a difference in someone's life;
- Learning about yourself;
- Giving back; and
- Having fun.

As a Mentor you may help your Mentee:

- Plan a first project;
- Explore topics of mutual interest;
- Set some career goals and take steps to reach them;
- Learn more about your community and how to help others by volunteering;
- Strengthen communication skills and ability to relate well to all kinds of people; and
- Make healthy choices about day-to-day life.

Attributes of a Good Mentor

You don't have to be brilliant or particularly successful to be a good Mentor. If you want to be a good Mentor, take the time to learn about your role and you will be successful. Some of the qualities of great Mentors include:

- Having a sincere desire to be involved with a less experienced person.
- Respect for the less experienced person. Mentors should not have preconceived ideas that the less experienced person needs to be rescued, because Mentees are professionals as well.
- An ability to listen actively. It is relatively easy to give advice or express opinions; it is much harder to suspend your own judgments and really listen.
- Empathy. Empathy is the ability to understand at a very deep level what the other person is going through, even without having had the same experience.
- Seeing solutions and opportunities. Good Mentors balance a realistic respect for the real and serious problems faced by their Mentees. They are able to make sense of a seeming jumble of issues and point out sensible alternatives.
- Flexibility and openness. Good Mentors recognize relationships take time to develop and that communication is a two way street. They are willing to take time to get to know their Mentees.

A MENTOR IS A(N)	A MENTOR IS NOT A(N)
Friend	Social Worker
Coach	Parent
Motivator	Cool peer
Companion	A banking machine
Supporter	Nag
Advisor	Parole officer
Advocate	Saviour
Role Model	Babysitter

Mentee Expectations

The main ways a Mentor can help a Mentee is in the areas of advice, access and advocacy. Be sure to ask your Mentee what he wants from you. Early in the relationship the Mentee may not have a good answer to the question. Try again after several meetings to see if he has developed an answer. By the same token, it is important for the Mentor to realize what he wants from the Mentee. Remember every good Mentor is a good listener.

TIPS FOR SUCCESS AS A MENTOR	
DO	DO NOT
<ul style="list-style-type: none"> • Appreciate any signs of growth • Listen carefully to what your Mentee says • Ask good questions • Share your thoughts and feelings • Always be on time • Try your best to be a good role model • Learn any specific rules and requirements that are part of your program • Show that you recognize the Mentee's values and lifestyle • Strive for mutual respect • Be honest 	<ul style="list-style-type: none"> • Think you are going to change the world over night • Jump to conclusions • Be judgmental • Forget that communicating means listening too • Forget how important you are to your Mentee • Talk about things that are off limits • Try to be a parent • Try to inflict your beliefs and values rather than demonstrating them • Use rudeness or foul language • Be insincere

CHAPTER 6 –Mentor Worksheets

Worksheet 6 – Personal Reflections

Before going further, it is a good idea to think back on the relationships that you have had in the past. Who in your past acted as a Mentor to you? Take the time to think about a coach, a teacher or a family member who significantly influenced you when you were beginning your career. You will gain more from your future mentoring relationship if you take time, before you begin, to learn from your past. It doesn't matter whether the person was referred to as a Mentor, what is important is how the person influenced you and gave you special attention. Take the time to answer the following questions:

- 1) As you think back to when you were beginning your career, do you recall in any individuals in particular? Who were the people who really made a positive difference in your life? Make a list of them below.

- 2) Select two of these individuals who were particularly influential. Why do you think they took a special interest in you? What qualities did you have that made them want to spend time with you or encourage you?

- 3) What was it that made each of them a great Mentor? What did these important people have in common?

- 4) What might these experiences teach you about how you want to be as a Mentor? What lessons can you take away from these role models?

- 5) After analyzing these mentoring experiences from your past, consider the following:

- a. Mentoring is important to me because:

b. In becoming a Mentor, I hope to gain the following:

c. My Mentee will gain the following from a relationship with me:

6) What expectations (both mine and the Mentee's) do I need to discuss with my Mentee?

Worksheet 7 – Mentor’s Checklist: Are You Ready to be a Mentor?

Before proceeding with any mentoring relationship, you should consider the following points. It is appropriate to visit this list during your mentoring relationship to review your commitment.

- I am committed to drawing on my own experience (successes and failures) and learning to provide insights that I believe could assist the Mentee.
- I am committed to improving my skills as a Mentor.
- I am committed to being available to my Mentee for the time/frequency agreed upon in the mentoring plan.
- I am open to learning and receiving feedback from my Mentee.
- I am interested in learning from someone whose background and experiences are different from my own.

If you have concluded that you have skills and abilities that may be useful if you passed them on to another person and have checked off all of the above boxes, it is time for you to become a Mentor.

Worksheet 8 – Personal Evaluation

The next step is very important for both you as a Mentor and for your Mentee, because it helps prepare you for how you approach your new job as a Mentor. Your Mentee will be making a similar evaluation of his or her personal situation at the beginning of your new relationship. There are no “right” answers to these questions as they are personal, but you do need to formulate the answers.

Before starting a new relationship it’s a good idea to step back from your day-to-day life and ask yourself questions such as “where am I?” or “how am I doing?” This activity will also help you give feedback to your Mentee on how you see the relationship. You might consider transferring some of your more profound insights to your logbook.

Instructions

Take time to complete this questionnaire on your own. Your Mentee will be filling out a similar form. Consider discussing the results at a meeting with your Mentee, talking about each question, sharing your answers with each other. Remember, the purpose of this is to help you get a real picture of where you are—if you’re not honest, you’ll end up with a picture of someone else and not yourself.

Questions

Keeping in mind the goals you’ve set for yourself in your new relationship, answer these questions as honestly as you can:

- 1) Think back to when you were at a similar stage in your career as your Mentee. Try to recall how you behaved and what goals you had set for yourself. What were your top five strengths as a person that helped you reach the level you are at today?

- 2) What were my top five areas for improvement as a person—the five things I needed to overcome to reach the level I am today?

- 3) What were the top five opportunities available to me then and how do they compare to the opportunities available to my Mentee?

4) What were the top five threats to my career when I was at my Mentee's stage and how do they compare to what my Mentee faces today?

5) What are the five most important things I can do over the next six months to use my strengths to help my Mentee overcome his/her challenges?

Worksheet 8 – Potential Topics for Discussion

During the important first meeting there are many things that can be discussed if the meeting is planned properly. If not, you may find yourself in the uncomfortable position of being unable to control the discussion and have the meeting fail to meet your objectives and those of your Mentee. Remember the Mentee should lead the meeting, but if he is unable to do so, you need to be ready to help. Here are some questions you may ask yourself in preparation for the important first meeting:

- What career experiences have helped me most in my own professional development?
- What were the most important lessons learned from those experiences?
- What “truths” would I want to pass on from those lessons?
- If I were to contribute one quotation to my own book about succeeding in my profession, what would that quote be?
- What have Mentors done for me and for my development? What kinds of mentoring experiences have been most helpful to me?
- If I were able, what would I change about any of the Mentors I have had?
- How relevant do I believe my experiences and professional learning will be to the development of my Mentee?
- As a Mentor, how would I like to be remembered?
- What can I offer someone I Mentor?
- What are my major strengths and talents?
- How much time, effort and enthusiasm can I realistically devote to working with someone like this?
- What do I think my Mentee should contribute to the effort?

Getting To Know Each Other – There are many topics of conversation that can lead to a comfortable environment. Good Mentors always listen more than they talk. Some topics might include:

- What are the most important things you should be accomplishing on your job? (if applicable)
- Do you feel successful at your job at this time? If not, what is preventing you from succeeding? (if applicable)
- What do you like best about your job? (if applicable)
- If you could add variety, autonomy, and importance to your job, what would you do? (if applicable)
- What are your career goals?
- What have been the most significant learning experiences in your career?
- Do you feel you would benefit from any particular type of training?
- What do you think most hinders your success?
- How do you learn best?
- What knowledge, skills and abilities do you feel I possess that would most benefit you?
- What kinds of special learning or improvement opportunities do you feel I should provide or help you get?
- What do you want to know from me?
- What do you want most from me?
- What information do you have for me on how I can best help you or better understand what you need?
- What do you think we need to do to make this mentorship work?
- What do you need right now – today?
- What is the best way to give you feedback?
- What scares you?
- What makes you want to learn more?
- What talent do you feel you lack?
- What is the toughest stretch for you?
- What is your most satisfying success?

Mentors should leaf through the Mentee's section of this handbook to get an overview of their expectations. Many of the exercises for Mentors are repeated in the Mentee section; however, there are a number of exercises that you should know about. The guidelines for setting a personal vision and for determining objectives will be valuable to you. The Mentee's Checklist of Tasks will give you an overview of the process they will embark upon and will give you a good idea of what to expect.

Although the Mentee is expected to lead the mentoring process, if they struggle to do so, it is important for the Mentor to step in and provide guidance. As the Mentee becomes stronger, the Mentor can step back and let the Mentee lead.

Worksheet 9 – Planning the First Meeting

Before you undertake anything significant in your life that's new, it is important to do some planning. This worksheet walks you through some steps to plan a first meeting with your Mentee. Your Mentee will be creating a similar worksheet; you may want to send your version of this worksheet to your Mentee so you can both prepare for your first meeting.

Basic Background Information

My Mentee's name is _____

Nickname (if any) _____

Phone number(s) _____

Email address _____

Best time to call _____

What would I like my Mentee to call me? _____

Preparing for the First Meeting

Typically, the first meeting allows two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan some conversation starters, knowing that these are tools if you need them.

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

- 2) What are some things I could tell my Mentee about myself that would help us get to know each other a little bit? What details about me and my life story might be interesting and relevant to this Mentee?

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

4) What do I want out of the mentoring relationship? What are my hopes?

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

It is recommended that you look over your answers to this planning sheet shortly before your first meeting with your Mentee. You might even bring it along to use as a bit of a roadmap for both of you. Use your judgment, but remember to review your responses before the meeting this will make you more comfortable and relaxed. The results of your first meeting will have an important place in your mentoring logbook. Do not forget that you must keep track of this first meeting, and all other meetings (Appendix A).

You should expect that your Mentee will have prepared a preliminary Development Plan to go over during the meeting. Be careful to listen to your Mentee regardless of your own preparation. Ask him/her about their strengths or weaknesses. What do they need to work on? How do they see opportunities for growth within their careers? They should be prepared to talk about their goals.

Use the “10-60-90” Principal

The “10-60-90” principal instructs people so they will learn and grow to their greatest potential in the least amount of time. When you tell an adult how to do something, 10 per cent of what you say will be remembered. If you show an adult how to do something, 60 per cent of what you show will be remembered. If you do something with that same person, 90 per cent or more will be remembered. There are three steps to make this statement extremely effective as a mentoring tool. Firstly, make your Mentee successful; secondly, show him the success, and, thirdly, make sure he understands why he is successful.

Enjoy your role as a Mentor and guide for your Mentee.

Worksheet 10 – Giving Feedback

There are times in the mentoring relationship when the Mentor sees a need to suggest changes to his Mentee's behavior. It may be a simple characteristic such as a consistent improper use of a word or phrase to career-limiting characteristics such as an inability to eat properly in a restaurant. Any behavior the Mentor sees and considers inappropriate is potentially a topic for feedback.

There are, however, ways to give feedback that can ruin a good relationship or conversely, improve it. Constructive feedback should never be given on the spur of the moment. It must be planned. The following worksheet provides a format for planning what to say and how to say it.

Step 1: Identify the behavior for which you want to give feedback.

I would like to give my Mentee constructive feedback on...

Describe the focus of your feedback in terms of behavior. I have observed/noticed...

Step 2: Describe the effects of the behavior.

When you do _____

Step 3: Describe the change in behavior you are recommending.

Double-check your statements to make sure you are not using judgmental language or making generalizations. Then begin to deliver the feedback keeping the following tips in mind.

- Pick your time and place – it is a good idea to give feedback when you are both in a good frame of mind and in a private setting. Do not attempt to give feedback in the heat of the moment, particularly if you are upset or angry. Wait until you are both calm.
- Give your Mentee a “heads up” that you want to give him some feedback so he is prepared to listen.
- Remember to listen and to be empathetic, but do not be sidetracked with apologies or excuses.
- Acknowledge what your Mentee is saying, but stay on track with the delivery of the feedback.
- Get feedback on your feedback. After some time has passed, ask your Mentee how he feels about the experience, including what worked and what you could do better.

Reflections

Think back to your childhood. Who around you gave you feedback on how you were doing, in school, in the family, or at sports? Write their names below.

How did their feedback—whether it was called discipline, or advice, or coaching, or scolding—feel? Write down words that describe how you felt when you were a child about the feedback you received from the people listed above.

Think about bosses you have had in your career. What did they do to help you look at your performance and determine how to improve it?

Think of the person in your life who was the very best at helping you see how you were doing and how you might improve without shaming you or making you feel defeated. Write his or her name below, and then write how s/he did it. What do you remember about his/her approach? Do you think you might try that style with your Mentee?

CHAPTER 7 – Building the Relationship

The creation of a mentoring relationship means a great deal more than just going to meetings and having casual chats about the future. Here are some suggestions that can help keep the relationship on the road to success.

- 1) Both Mentors and Mentees should be assertive if either feels that there is a mismatch. It is better to pull the plug on a relationship at the outset than to struggle to maintain a relationship that has little value to either party.
- 2) The first meeting is extremely important and should be structured with an agreed-upon agenda. The Mentee must have clear objectives to discuss with the Mentor and be prepared to discuss what is needed to be successful in his/her career. It is also important to clearly define what is expected of each party; the frequency and length of meetings; the boundaries around the relationship (what will and will not be discussed); and the length of the relationship.
- 3) The relationship will be successful both parties meet their commitments; respect the time restraints that occasionally interrupt expected schedules; confine themselves to the issues set out in the first meeting; never betray confidences; and, always show appreciation for the time spent on the relationship.

Suggested Activities

There are many activities that Mentors and Mentees can work on together that will help reach specific goals. No activity should be undertaken simply as something to do; activities must be directly related to the reasons why the relationship was created. With that in mind, here are some potential activities that a Mentor might assign:

- Suggest reading a specific paper or article, or attend a lecture, short course or seminar that relates to the goals of the Mentee;
- The Mentee and Mentor attend a business reception together with pre- and post-reception discussions;
- The Mentee prepares and gives a presentation related to his or her work and the Mentor will review and discuss the aspects of the work; and/or
- The Mentee writes letters or brief reports that the Mentor reviews and discusses with the Mentee.

The purpose of any development project is to expand the Mentee's understanding of the profession, to develop his or her skills and help solve problems. It is very important for the Mentor to remember that the main purpose in creating a project is to develop skills and increase confidence, not to produce a product or directly benefit the Mentor. It is important to begin discussing the potential for projects at the outset of the relationship.

Projects

As the mentoring relationship develops over the months it may be that the Mentee's development might be aided by your perceptiveness on a specific project. The idea is to provide the Mentee with an experience that will help him or her reach an important goal.

If you do decide to assist with a specific project, here are some guidelines on how to keep track of the process. These guidelines are basic project management and can be useful in any project.

Prior to start of project:

- What do you feel your target should be on this project?
- What is your production goal?
- What time line should you have?
- What will it take to get it done within that time line?
- What do you need to get started?
- What past project or experience will help you in working on this?
- Who do you need to work with you on this?
- Who do you need to coordinate with?
- What preparation should you be making?
- How long will it take you to complete your preparations?
- What resources should you gather before beginning?
- What external resources will you need?
- What internal resources will you need?
- What is your plan of attack?
- What is your learning goal?

Let's really look at this...

- What's the point of trying it that way?
- What other ways are there to make it work?
- What will you learn from trying it that way?
- What assumptions are you making about the project?
- What are you most confident about?
- What is scaring you the most?
- What do you need to know from me?
- What do you want from this experience?
- What obstacles can you identify at this point?
- What will be your first step?

Refining the plan...

- What efficiencies should you try to achieve as you develop the project?
- How will you monitor your progress?
- How will you know if you need help?
- What challenges do you foresee to "your way of thinking" in performing this activity?
- How will this assignment challenge you to alter your way of thinking about projects?
- How will you flag your need to think "out of the box" as the project proceeds?
- What will happen if you do it the way you plan?

Getting help...

- How will you use the help of others?
- What must be in place before you can begin?
- How will you evaluate your progress?
- How will you measure your success?

Achieving success...

- This is my suggestion for what might work best.
- Watch out for this pitfall.
- This pitfall has caused _____ in the past.
- Tell me the part of my suggestion that you think might not work.
- If you take the approach you are suggesting, it will probably have _____ (this) _____ effect.
- Let's brainstorm how to do that; I've got some ideas.
- This is what I think you will gain from working on this.
- This is what success on this will do for you.
- These are the costs for failing on this.

Be sure to track any projects in your logbooks. It is very important to log all of the steps taken and the results, both good and bad.

Potential Relationship Problems

In every relationship there are times when it is important to review how things are going. By now you have learned that having a mentoring relationship requires a great deal of effort. Like all human interaction, mentoring carries a certain amount of risk. If you are aware of what these risks are, you have a better chance of avoiding problems.

- **Possible Problem #1 – Not Enough Time**

Everyone is short of time. Even the most casual mentoring relationship requires time. Intensive relationships require even more time: time to plan, time to meet, time for sending and answering e-mails, time for telephone conversations and time for thinking.

The problem is not just a problem for Mentors who don't have enough time. A Mentee whose Mentor is very generous (and/or demanding) with his/her time can be run ragged. It is very important to decide before the relationship begins how much time will be devoted to the relationship.

- **Possible Problem #2 – Personal Problems**

If a Mentor runs into difficulty in his or her own life, either personally or on the job, it affects the Mentee directly. If the personal problems restrict the Mentor's time to the extent that the relationship is suffering, the Mentee is well advised to look for a new Mentor.

If the Mentee runs into serious personal or job difficulties, it can result in a serious increase in the amount of time the Mentor needs to be with him or her. The Mentor must make sure that he is not spending more time on the relationship than the Mentee. Occasionally, a Mentor may discover that the Mentee is just not interested in doing any more than absolutely necessary to get by. If a relationship is not working, it is best for both the Mentor and the Mentee to end the relationship. If you are following the process outlined in this handbook, you will have negotiated at the beginning how to end the relationship. Always end a relationship on a friendly note; this is extremely important. Always leave a door open.

- **Possible Problem #3 – Unrealistic Expectations**

Being a Mentor or a Mentee for the first time will cause some concerns regarding just how much mentoring is enough. A Mentor may feel that s/he is responsible for what happens to a Mentee while the Mentee may want a more distant relationship. If the Mentor has a specific career move that seems a great way for the Mentee to succeed, it may conflict with the way the Mentee sees his or her own future. This may cause a case of guilt in the Mentee if he feels that the Mentor is really going out of his way to help.

Another unrealistic expectation occurs if a Mentor *expects* the Mentee to do as he suggests. These problems can be avoided if the goals and objectives of the Mentee are defined and discussed in detail at the beginning of the relationship. Do process checks from time to time to see if the expectations of the Mentor and the Mentee are reasonable.

- **Possible Problem # 4 – Expectations of Failure**

Individuals generally perform at or near the level expected of them by others. Mentors with high expectations of the Mentee inspire achievement. If a Mentor has only accepted the role of a Mentor because he sees it as a career move, and doesn't care about the process or the Mentee, the Mentee begins the relationship with at least one strike against him. Expectations of failure can be a self-fulfilling prophecy.

The best solution to this problem is to avoid starting it. If a Mentor has a genuine feeling that a potential Mentee will not be successful, it is incumbent upon him/her to decline participation (in a structured program) or explain to the potential Mentee that s/he should find a different Mentor.

- **Potential Problem # 5 – Mentee's Feeling of Inferiority**

It is common for Mentees to do a little comparative analysis while working with the other Mentees. If the Mentee feels that he is not moving ahead as quickly as others in the group, it may lead to feelings of "failure." Indeed, if the Mentor selected for the Mentee is less dynamic than other Mentors, it can lead to the Mentee's feeling less important. If the Mentor is a superstar, it can cause strong feelings of inferiority in a Mentee.

It is very important for the Mentee to learn to avoid this problem by changing how he judges success. This is all part of setting up the relationship. Remember that good planning and clear procedures greatly strengthen mentoring relationships and help avoid problems and pit-falls.

CHAPTER 8 – Mentorship Relationship Worksheets

Worksheet 11 – The Mentor/Mentee Contract

A good mentoring relationship starts with preparation by both parties. It is recommended that the relationships have a duration of one year. It is a very good idea for the Mentor and the Mentee to have a contract for how they intend to work together. Contract may include the following:

- Specific short term and long term objectives for the relationship;
- Preliminary developmental goals for the Mentee;
- Expectations that both of you have for the relationship;
- Necessary contributions that both must make so the relationship will work;
- Tentative schedule for your formal meetings;
- Procedure for handling informal contacts between formal sessions;
- Determine who has the chief responsibility for driving the relationship;
- Agree on confidentiality; and/or
- Describe the differences in the role of the Mentee and the Mentor.

A MENTORING CONTRACT BETWEEN:

Mentee	Mentor
Name	Name

I/we have both read the CPA Alberta's Mentoring Handbook and/or other mentoring guides, and have a good understanding of the strengths and limitations of any mentoring relationship.

We will respect each other's confidence and those of our employers. We will be open and forthright with each other. We will work towards these goals (attach list if required) with the following specific objectives (as appropriate):

We will meet every _____ (e.g. second Friday) on the following schedule
_____ (noon, Sept. – June, etc.) for _____ (period of weeks/months).

We will review our progress _____.

In the event one of us remains out of contact without explanation, for longer than _____ weeks, the relationship is voided and this contract will expire.

Dated: _____

Mentee's Signature: _____

Mentor's Signature: _____

Worksheet 12 – Status “Check-up” Worksheet

This worksheet is intended for Mentees and Mentors to complete and share each quarter. It’s time to do a “checkup” if you have already done goal-setting, have gotten to know each other reasonably well and have done a variety of activities together. You can also use this worksheet when things get rocky and you feel some honest mutual feedback might help.

My Mentor/Mentee and I have been meeting for _____ (amount of time). I feel we have established enough trust between us that we can work well together.

Yes No Not Sure

If he/she’s upset or unhappy with our relationship, or me, I’m confident my Mentor/Mentee would talk to me about what’s going on.

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

If I were upset or unhappy with my Mentor/Mentee or our relationship, I would feel comfortable talking with him/her about what’s going on.

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

I feel we’ve made real headway in setting goals and take steps to implement them.

Strongly Agree Somewhat Agree Neutral Somewhat Disagree Strongly Disagree

Five things I feel are going great in our mentoring relationship are:

One thing I wish I could change about how we interact with each other is...

If I had to guess what my Mentor/Mentee likes best about how we work together it would be...

Sometimes I think my Mentor/Mentee wishes I would...

After you've each completed this worksheet, consider devoting one of your meetings, or part of one, to sharing your responses. Remember that no relationship is perfect and constructive feedback is healthy and can help strengthen your connection.

Compare your responses. Be sure to value both situations in which you agree and those in which you disagree—it's all good information. After you've finished sharing, talk about next steps: what you each can do to strengthen the "good stuff" and overcome any difficulties. Commit to a plan of action together.

Worksheet 13 – Problem Solving Worksheet

If Things Go Wrong

If it appears that something is wrong with your mentoring relationship, the easiest thing to do is walk away. While walking away is easy, it is always inappropriate and unprofessional. Think of the amount of time you have already invested in the relationship up to the point that you contemplate quitting. Also, consider how others, both inside the mentoring program and in the profession, may perceive your actions.

As mentioned many times in this handbook, if you plan your relationship carefully, there will be little room for problems. You will have planned how to end the relationship if either the Mentor or Mentee is not comfortable with the arrangements, but ending the relationship should be a last resort. You need to determine logically and quietly whether the mentoring relationship can be saved, whether it is worth saving, and whether the time, energy and emotional costs will result in a win-win situation. This is not easy. The following worksheet is designed to help you through the process of deciding how to solve your mentoring relationship problem.

What's the problem?

- Give me your view on the situation.
- What is the history?
- How long has this been a problem?
- When did you first define it as a problem?
- What part did _____ play in it?
- Tell me your assessment of _____'s part.
- Why is this a problem?
- What is the real problem?
- What are the costs and benefits?
- What price are you (others, and your organization) paying now because of the problem?
- What is the cost of solving it?
- Would solving it be worth the cost?
- Where is your leverage for solving the problem?
- Which alternative gives you the most leverage?
- What aspects of the situation point toward you working through it successfully?
- What forces hinder you?

Step 1: Define the problem

What is the problem you want to work on? Write it down as you define it now.

Ask yourself: Why is this a problem? Is it a real problem or a symptom? Is your problem really a proposed solution to the real problem? Write your thoughts on these questions.

Rewrite your definition of the problem.

How to go about solving the problem...

- What outcome do you want?
- How will you know when you have it?
- What is keeping you from having it today?
- What is reasonable to achieve?
- What must you do to accomplish this?
- What would _____ have to do?
- What would you say to _____ to get him/her to see their part in the problem?
- What would _____ answer if you said that?
- Picture the situation as you would like it to be. If it were working perfectly, how would it look?
- What will you do first?
- What resources do you have to help you?
- What will you do if you run into a problem in trying your plan? Why don't you do that now? What is stopping you?
- What will you say to _____?
- Do you have a "plan B"? What would it be?
- How might I help you? What do you need?
- How are you contributing to the problem?
- What have you learned about yourself by grappling with this issue?

Step 2: Define success in solving the problem

- If you were to succeed in solving the problem you have just defined, what would success look like?

- Describe what would happen if you were successful.

What have you done to help?

- Have you done anything to confront the problem?
- Why not? (If the answer to the above is "no" or "kind of")
- What could you have done?
- What would have happened if you had?
- What is the best thing that would have come from it?
- What is the worst thing?
- This may take you out of your comfort zone, but how would you confront _____ on this issue?

Step 3: Generate alternatives

What are some ways you could solve your problem and achieve the success described? Come up with a list of choices. Do not edit yourself, just think of as many as you can.

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Which of these do you like best? Circle three to five of the best.

Suggestions...

- This is how I envision the possibilities...
- How about _____? He might be of real help.
- I agree with your approach.
- What if you did _____, in addition to that?
- What if you did as you are suggesting, but positioned it this (a different) way?
- Would you do it this way _____ or that way?
- What would happen if you _____?
- This is the way I have approached similar problems in the past
- Why are you suggesting that? Do you believe that will work best? What would be the best thing that will result from that?
- I think what you are suggesting will run into this difficulty. _____
- Because _____ I think you will need to achieve _____ in the end. This is the bottom line.
- Tell me how you disagree with me. Negotiate with me.
- We need to solve the problem by _____.
- How will you do it?

Step 4: Evaluate alternatives

The next step is to pick a "Plan A" and a backup "Plan B" for solving your problem. Here are some things to consider in picking from your list of choices.

- How much time will this take?
- Will it cost any money?
- Are there any downsides?
- Will the option yield other benefits beyond solving the problem?
- What just seems to be the best?
- Who else will be affected?

Once you have considered all of this, write the letter "A" beside the first choice and "B" beside the second best choice.

Step 5: Agree on action

If you want to follow through on this approach to solving the problem, it is important to decide what you need to do and when. The Mentor and Mentee should do this together.

My "Plan A" is to...

To accomplish this, I will:

TASK	BY WHOM	WHEN

Step 6: Schedule follow-up

Set a time to check back with each other to see how the problem solving is going or how it went. We will check on progress on _____ [date].

Questions to discuss:

What did or did not work in solving the problem?

Knowing what you know now, what would you do if the problem happened again?

Appendix A – Mentoring Log

Directions: Read through this log before your first meeting with your Mentee and fill in what you can. Be sure to structure your first meeting so that you will be able to answer most of the questions after the meeting. Maintain the log by describing each meeting.

1. Background information on the Mentee/Mentor:

Name _____

Preferred name or nickname _____

Job Title (if applicable) _____ Department _____

Address _____

Telephone: (daytime) _____ (evening) _____

Fax number _____ Cellular _____

Educational background _____

Professional or work background _____

Other information:

2. Mentoring Partnership Will Cover Period _____ to _____

3. Mentee's Tentative Career Plans and Ideas:

(Note where the Mentee is now and what he is considering doing later. Mentee, include your development plans.)

4. Assistance Needed by Mentee:

(Mentors, ask Mentee for this, and add ideas based on your experience. Refer to Development Plans. Mentee list what you need.)

Immediate: _____

Longer term: _____

5. Specific Assistance I Can Provide as a Mentor or Need as a Mentee:

6. Other Individuals or Resources that may be Helpful:

7. My Time Limits or Constraints on this Partnership:

8. How I Will Know That my Mentee/Mentor and I Have Been Successful in our Efforts:

9. Log of Meetings and Other Activities with Mentor/Mentee:

1st _____

(Date, time and location)

Purposes/Assistance _____

Comments After _____

Follow-up Steps

Mine _____

Mentor's/Mentee's _____

2nd _____

(Date, time and location)

Purposes/Assistance _____

Comments After _____

Follow-up Steps:

Mine _____

Mentor's/Mentee's _____

3rd _____

(Date, time and location)

Purposes/Assistance _____

Comments After _____

Follow-up Steps:

Mine _____

Mentor's/Mentee's _____

4th _____

(Date, time and location)

Purposes/Assistance _____

Comments After _____

Follow-up Steps:

Mine _____

Mentor's/Mentee's _____

Appendix B – Additional Resources

Mentorship Resources

- **National Mentoring Partnership**
http://www.mentoring.org/about_mentor
- **Management Mentors**
<http://www.management-mentors.com/>
- **The Mentoring Partnership**
<http://www.thementoringpartnership.com/>

Employment Resources

- **CPA Alberta Career Centre**
<http://www.cpaalberta.ca/Services/Career-Centre>
- **CPA Source**
<http://www.cpasource.com/public-members>
- **CPA Alberta Employment Opportunities**
<http://jobs.cpaalberta.ca/accounting-jobs-in-alberta/index.html>
- **Calgary Region Immigrant Employment Council (CRIEC)**
<http://www.criec.ca/>
- **Edmonton Region Immigrant Employment Council (ERIEC)**
<http://eriec.ca/>

Networking Resources

- **CPA Alberta Connector Program**
<http://www.cpaalberta.ca/Services/Career-Centre/Mentorship-and-Networking-Programs/CPA-Connector-Program>
- **CPA Alberta Career Centre**
<http://www.cpaalberta.ca/Services/Career-Centre>