



Health
South Eastern Sydney
Local Health District

Mentoring Toolkit

Connecting people to knowledge, experience inspiration



People and Culture 2020

Name:

Purpose

The purpose of the Mentoring Toolkit is to share some tools and resources that can be used in partnership between a mentor and mentee to help explore challenges, establish goals, reflect on and celebrate progress. The Mentoring Toolkit has been designed by the Organisational Development and Learning (ODL) team, within the People and Culture Directorate, to support mentoring partnerships across South Eastern Sydney Local Health District (SESLHD).

The Benefits of Mentoring

Benefits of Mentoring

The Mentee...	The Mentor...
<ul style="list-style-type: none">Increases skills and knowledgeIncreases confidenceBetter understands culture, values and structureIncreases professional competenceIs satisfied and empowered	<ul style="list-style-type: none">Is appreciated for his/her know-howShares valuable knowledgeDevelops leadership skillsIs satisfied by guiding others in their developmentBecomes a positive role model

Write down your thoughts on how Mentoring could benefit you

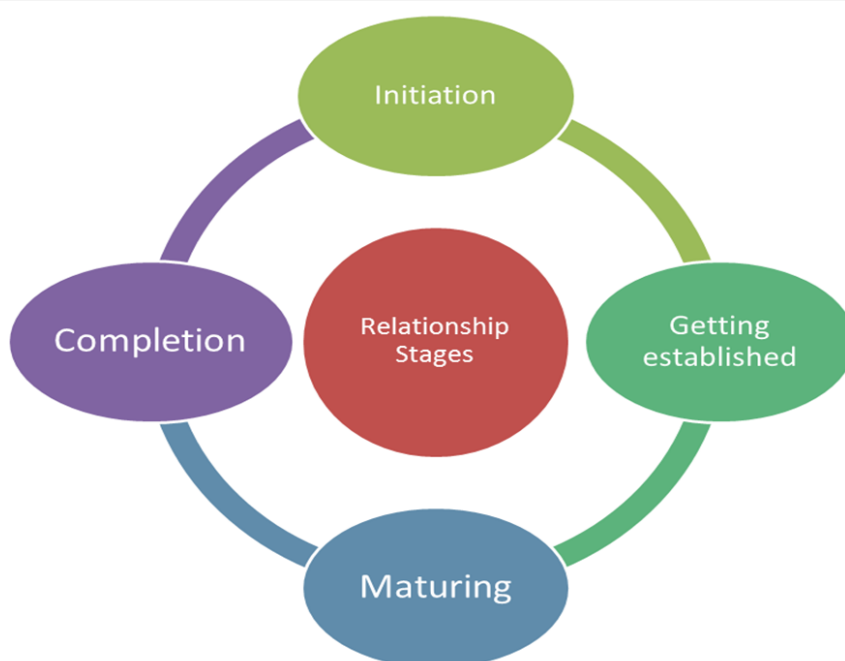
Identifying a Mentor

What are you looking for in a mentor? Write down skills, knowledge, experience, role model

Overview of the Mentoring Relationship Stages

Mentoring involves four key phases: initiation; getting established; maturation and completion. Each mentoring relationship is unique, and there is no one right way of approaching your relationship. This toolkit offers some useful suggestions and resources that you can use to support different phases of your relationship.

The mentoring life-cycle Stages of the relationship



Stage 1: Initiation

Key actions:	Template/Resource
- Set agreed expectations and ways of working with each other	(page 7)
- Sign the Mentoring Agreement	(page 8,9)
- Mentee identifies what they want to achieve based on 'What Matters to Me at Work?'	(page 10)
- Establish a structure for your Mentoring sessions	(page 12)
- Set Goals	
o Different types of goals	(page 13,14)
o Smart Goal Template	(page 15,16)

The initiation phase is the starting point for connecting as mentor and mentee and getting to know each other, breaking the ice and establishing rapport. The development of an initial bond and mutual respect starts to develop in the first few meetings through sharing your hopes about what you would like to get out of your mentoring relationship, what strengths you bring and what expectations you hold for yourself and each other, in the role as mentor and mentee.

SESLHD's CORE Values of Collaboration, Openness, Respect and Empowerment form the basis of all mentoring partnerships, and the conduct and behaviour of both parties are in line with those outlined in the NSW Health Code of Conduct accessible at:

http://www0.health.nsw.gov.au/policies/pd/2015/pdf/PD2015_049.pdf

Stage 2: Getting Established

Key actions:	Template/Resource
- Begin a meeting log (optional) or maintain a record elsewhere to track discussions, actions and agreements	(page 22, 23)
- Review goals at every meeting with your mentor	
- Mentee completes online self-assessments:	
o The NSW Health Leadership self-assessment	(link on page 5)
o The Via Character Strengths	(link on page 5)
o Wheel of Life	(link on page 5)

Self-reflection and developing an understanding of our personality preferences, strengths and leadership capabilities and setting an inspiring personal vision can be used as a basis for identifying development goals. Sharing these results can help engage curiosity, and develop trust and insight.

Leadership Capabilities

To assist in identifying mentoring goals, mentees can complete the NSW Health Leadership Self-Assessment accessible at <http://www.springboard.health.nsw.gov.au/sat/>. Results can be used to reflect on areas that may be incorporated into goals.

Character Strengths

- VIA Character Strengths Survey

Understanding your character strengths help focus on your innate character strengths, and reflecting on these provides you with resources that you can use when working towards your goals.

<http://www.viacharacter.org/www/Character-Strengths-Survey>

Inspiring Personal Vision

Developing an inspiring vision of the future self, when goals have been achieved helps us to align our values with our goals, and create hope through exploring emotions that we would experience when we achieve the desired future state. It helps us have something to reflect back to that generates the enthusiasm we need to help us achieve our goals and is useful when we experience challenges. Linking what we are wanting to achieve with our personal identity and personality also contributes to changes being sustained, as they become part of who we are.

The Wheel of Life exercise can be a helpful place to start when considering current priorities, and guiding a discussion about where priorities need to shift to achieve goals. A useful template, with instructions can be accessed at:

<http://www.thecoaches.com/docs/resources/toolkit/pdfs/18-Wheel-of-Life-Exercise.pdf>

Stage 3: Maturation

Key actions:	Template/Resource
- Reflection and review of Mentoring relationship - what's working?	(page 17)
- Deep conversations based on coaching principles /IGROW Model	(page 18,19)
- Mentoring Partnership Discussion Guide	(page 20,21)
- Goal Progress Worksheet	(page 22)
- Mentoring Session Log	Page 23)

As the mentoring relationship evolves, the mentor helps guide the process of facilitating deep learning, encouraging the mentee to reflect.

With strong trust, there will be a shift in the mentor's role to constructively challenge existing perspectives, identify potential changes, celebrate success and explore wider perspectives.

Ongoing reflection and review of the Mentee's progress towards achieving their goals continues.

Stage 4: Completion

Key actions:

Template/Resource

- Mentor and Mentee agree to end the Mentoring relationship

(page 22,23)

The completion phase occurs in mentoring for a number of reasons:

- The agreed mentoring time period has come to an end
- Mentor and mentee both feel the relationship has come to a natural end
- The mentoring relationship has fulfilled its purpose and desired goals have been achieved
- The mentor and mentee did not have the desired personality match
- The mentor or mentee have had a change in priorities or commitments, and one or both can no longer participate in the mentoring relationship

In the completion phase of the relationship you may wish to:

- Review the mentee's goals and progress
- Discuss how to spend remaining sessions
- Plan a celebration of the relationship

Reflecting on learning and accomplishments using the following questions can assist:

- Share three significant learnings from your time together. What made these significant and where have you applied these learnings?
- Have there been any surprises, unanticipated learning, challenges, and positives?
- Which areas have you developed the most in and what are the ways you will keep learning?
- What did we accomplish together?
- Reflect on the differences in our communication between the first meeting and now?
- In which ways has this relationship contributed to personal growth for each of us?

<http://sdps.ucdavis.edu/toolkits/mentoring/Preparing%20for%20Closure.html>

MENTORING RESOURCES AND TEMPLATES

Stage 1: Initiation

The following tools and templates can be used during the initiation phase.

Mentor and Mentee Discussion Guide: Our expectations of each other

1. What do we each expect to gain from and give to our mentoring relationship?
2. What behaviours can we expect from and rely on each other for?
3. While we can discuss and work through responsibilities, ideas and issues, who is in charge of executing the actions from each session? How will we define this, hold ourselves and each other accountable and reflect on this at each session?
4. What are the strengths that we bring to this relationship?
5. What barriers can we think of that could present challenges for our relationship and how will we agree to manage these?
6. Are there any boundaries we need to discuss and set for our relationship? How will we hold each other accountable in our relationship?
7. If we find that this relationship isn't working for us, how will we check in with each other and what will we do to manage this?

MENTORING RELATIONSHIP AGREEMENT

The aim of the Mentoring Relationship Agreement is to document the:

- Protocols and procedures to be followed
- Agreed goals for the mentoring relationship
- Expectations of the mentor and mentee

Mentor and Mentee must discuss and agree on the following before signing:

1. We are voluntarily entering into a mentoring relationship and agree that this will last for a period of months.
2. We agree to:
 - Maintain confidentiality and respect the other's privacy
 - Be respectful, non-judgemental and supportive of each other
 - Keep to scheduled meeting times and give adequate notice of changes
 - Behave ethically and safely at all times

3. The following goals have been discussed and agreed:

Goals	
Goal 1 (e.g. personal development)	
Goal 2 (e.g. professional development)	
Goal 3 (e.g. development of specific personal or technical skills)	

4. We have discussed our workloads and availability throughout the coming __ months. The mentoring agreement will commence on / / 20 and finish on / / 20

We have agreed on the following contact arrangements:

Contact arrangements
Contact frequency: (fortnightly, monthly, other)
Preferred contact: (face to face, email, phone, other)
We have agreed who will have primary responsibility for keeping in touch: (mentor , mentee)
Next face-to-face meeting date & venue:

4. Although we endeavour to complete the program, we understand that the relationship can be discontinued by either party on a no-fault basis if necessary.

We have read, understood and agree to these guidelines and procedures.

Mentee Signature: _____

Print name: _____

Mentor Signature: _____

Print name: _____

Stage 1: Initiation

WHAT MATTERS TO ME AT WORK?

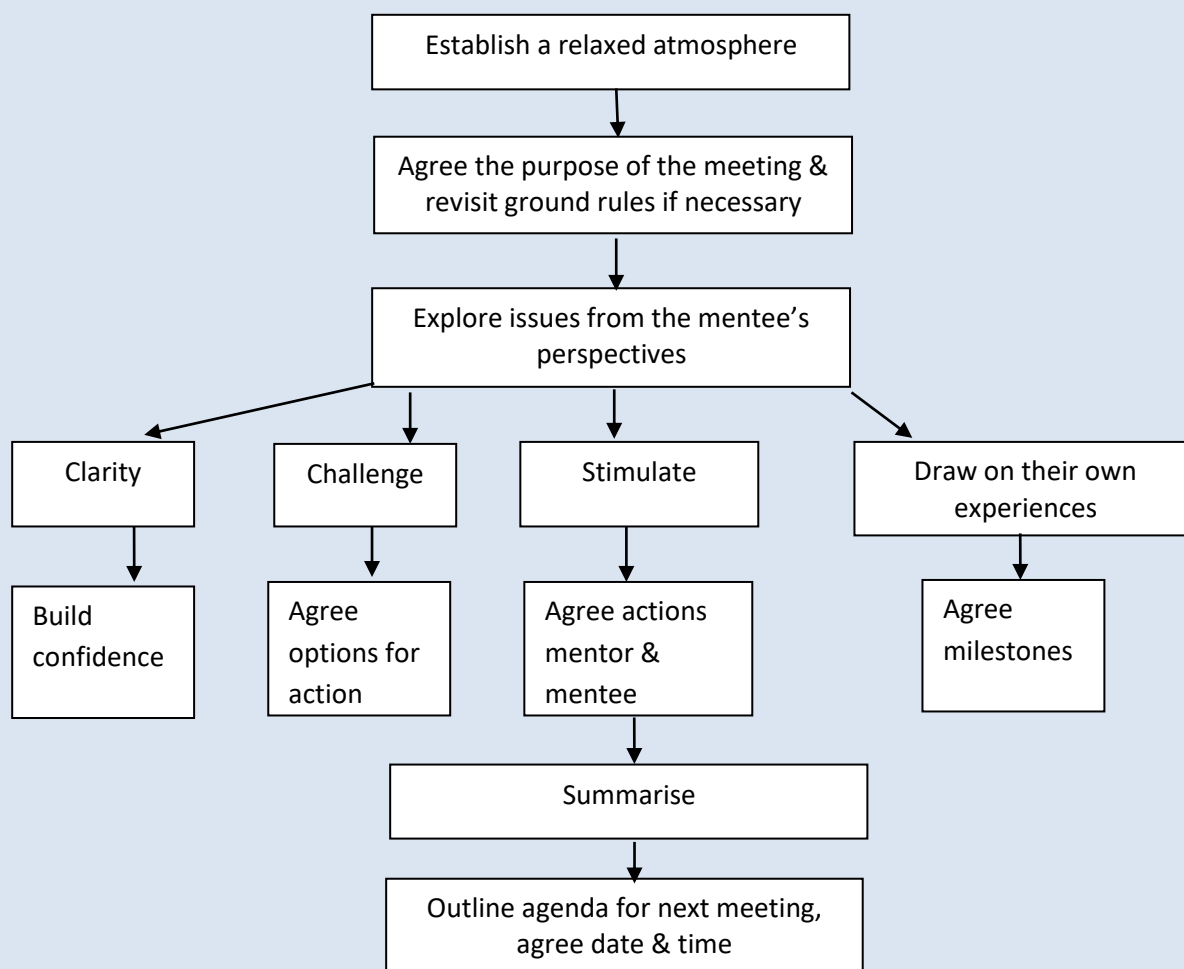
The mentee is the driver of what they will get out of mentoring. The most important thing is to be clear on what the mentee wants to get out of the relationship. Some ideas to explore as a starting point are listed below. Add your own development areas, and questions to consider when thinking through your purpose for mentoring.

Development Area	Questions to consider
<input type="checkbox"/> Developing Leadership capability	What is my current level of leadership capability? What do I want it to be? What are the gaps I can use for goal development?
<input type="checkbox"/> Motivation	What is motivating me to achieve changes in my performance? What is my ideal self in relation to my career aspirations? What are my values and how do these motivate me?
<input type="checkbox"/> Support	What support do I need from my mentor and what does that look like? Who are other people that can support me as I work towards my goals?
<input type="checkbox"/> Gain health sector knowledge	What do I want to know more about in the health sector? How can my mentor help with this?
<input type="checkbox"/> My vision for the future	What is my dream job? Where do I want to be in 5 years? What are the short and long term steps I need to put in place to achieve this?
<input type="checkbox"/> Networking	Who is in my existing network? What areas would I like to develop networks in? Can my mentor offer support with this? How can I become part of new networks?

Development Area	Questions to consider
[] Work/life balance	What areas of my life do I currently invest most of my energy in? Are these aligned with achieving my future goals? What behaviours and actions do I need to change to achieve my goals? What support can I access to improve my wellness at work? How am I practicing self-care and wellbeing?
[] Career transition	What is the next step in my career? What skills and strengths do I have that I can take into my new role? What skills, capabilities and qualities do I want to develop to be successful in another role? What transferable skills do I have? What actions do I need to take?
[] Practice insight, reflection and self-awareness	How do I respond to feedback and provide feedback to others? Do I think about my thoughts and feelings? Do I practice self-reflection? What tools and resources are available to support me with this? Who can I seek feedback from to see if I am succeeding in developing more insight and self-awareness?

Mentoring Session Structure

While each mentoring session can have a different focus, it is good practice to agree on a session structure, as suggested below.



Adapted from The Good Mentoring Toolkit for Healthcare, 2004, Helen Bayley, Ruth Chalmers & Caroline Donovan

How sessions are structured is dependent upon decisions made by the mentor and mentee. It is acknowledged that a degree of flexibility can be helpful, and depending upon the preferences of the mentor and mentee this can be negotiated. The key point is to create a balance between exploration of issues, reflection, and generation of options and action steps that support goal attainment.

Goal Setting

Goals are internal representations of a desired state of being. Once an inspiring personal vision linked to values has been established, it's time to set some key goals that will be the focus of mentoring sessions. The most effective goals are those that are shaped as learning goals, and guide us to take incremental steps to achieve our desired outcome.

Emergent Goals

It can sometimes be challenging for people to identify goals, and it's important to recognise that goals are iterative, need to be flexible and it is natural for them to evolve and change. Mentoring conversations help explore different areas that might be developed.

The mentor and mentee can use the following questions to help think through abstract goals, and work together to ground goal identification into tangible practical actions.

Goal Domain	Questions
Identity	Who are you? (Not what you do) Who do you want to become? How does what you do now align with who you aspire to be? What prevents you from being the person you aspire to be? Who/what supports you in being the person you aspire to be?
Values	What do you care about? Why is this important to you? What difference do you want to make and why?
Resources	How well supported are you? (at work and/or home) Who is in your developmental network? How does this affect your sense of the possible? What resources would enable you to be more effective in your work and non-work roles?
Purpose	What do you want to contribute? What do you want to achieve for yourself? What's the point of these? What achievement would give you great satisfaction to look back in in 5 years? What's wrong with the status quo?

Adapted from Beyond Goals, Effective Strategies for Coaching & Mentoring, S. David, D. Clutterbuck & D. Megginson

Goal Types

The table below helps identify goals types, purpose and questions to guide conversations for goal development.

Goal Type	Purpose	Goal Conversation
Task learning	Shadowing / learning skills	What do you need to know? What does success/competence/achievement look like in this task? How will you know how well you are doing?
Skills transfer/acquisition	Transition from incompetence to unconscious competence	What skills do you need to learn? How will you apply them?
Performance enhancement	Achieving specific targets	What do you need/want to do? What does excellence look like? What coping strategies will help you manage weaknesses? How can you build on strengths?
Career development/self-management	Achieving career success	What is your ambition? What resources do you have (internally & externally) to help you achieve your career ambition?
Behavioural change	Develop specific competencies or overcoming defined weaknesses	What needs to change in the way you think, to produce changes in the way you behave? How will you sustain change? How will you ensure others see how you have changed?
Whole person development	Wider self-fulfilment	How can you grow as a person? Who do you want to become and why? How will you manage the conflicting demands on your time, energy and attention?
Transformational change	Clarifying life purpose; acquiring greater sense of maturity	What is the critical transition you need to make in the way you approach your work? What insights do you need to acquire to bring about personal change? What do you need to let go of, to fulfil your potential?

Adapted from Beyond Goals, Effective Strategies for Coaching & Mentoring, S. David, D. Clutterbuck & D. Megginson

SMART Goal Template

SMART goals help focus on the specific, measurable, achievable, realistic and timeframes within which goals will be achieved. Use this template to help structure agreed goals.

SPECIFIC

What exactly do I want to accomplish:

MEASUREABLE

How will my goal be measured?

How will I know when my goal is accomplished?

ATTAINABLE/ACTION ORIENTED

Is my goal challenging but still possible to achieve?

Actions required to achieve my goal:

REALISTIC/RELEVANT

Is my goal realistic within the resources at hand?

Am I willing to commit to my goal?

Why do I want to reach this goal?

Is my goal relevant to my life purpose and my big picture?

Will achieving this goal help me lead the life that I want to have?

TIME BOUND

Is my goal trackable?

Is the timeframe realistic and achievable?

When will my goal be reached?

Effective goals answer 'YES' to these questions

Does this goal direct attention towards relevant activities?

Do you feel energised when you read this goal?

Could you stick at this goal the way it is written here? Does it need rewording?

Does this goal help you think about different tasks, options and paths to achieving your desired outcome?

Stage 3: Maturation

The following tools can be used to guide reflection and discussion.

4+1 Reflection Questions

4 + 1 Questions

What have we tried?

What have we learned?

What are we pleased about?

What are we concerned about?

What do we need to do next?

<http://www.helensandersonassociates.co.uk/person-centred-practice/person-centred-thinking-tools/>

IGROW Coaching Model

This is a coaching model that can be used for mentoring

I ssue	<p>What would you like to discuss?</p> <p>Can you tell me more about the situation?</p> <p>Of these situations you are raising, which is the most important for you to explore now?</p>
G oal	<p>What would you like to get out of today's conversation?</p> <p>What are your best hopes for our conversation today?</p> <p>What will reaching the goal give you?</p> <p>What will achieving this goal make possible?</p> <p>What do you want to achieve in relation to this?</p> <p>How will you know you've reached your goal?</p> <p>How will you know when you've achieved success? What will it look/ feel like?</p>
R eality	<p>What's happening for you now?</p> <p>What, when, with whom and how often?</p> <p>What is the result of that?</p> <p>What is going well?</p> <p>Tell me about times when this hasn't been a problem?</p> <p>How did you manage to achieve that?</p> <p>What have you done so far?</p> <p>What can you do more of?</p>
O ptions	<p>What else could you do?</p> <p>What could you do differently?</p> <p>Imagine you already reached your goal. How did you get there?</p> <p>What if this obstacle wasn't there anymore?</p> <p>What else do you need to reach your goal? Where can you get it? Who can help you?</p> <p>What options might others suggest?</p> <p>What are the pros and cons of this option?</p>
W rap Up	<p>What are you taking away from our conversation?</p> <p>What do you need to do to move forward from here?</p> <p>Which of these options energises you?</p> <p>What specific actions can you take NOW?</p> <p>What steps come after?</p> <p>How will you overcome your obstacles?</p> <p>How motivated are you, on a scale from 1 to 10, to go for this option?</p> <p>What would it take to move one point further on the scale of 0-10?</p> <p>Who can support you?</p> <p>How will you keep track of your progress?</p>

Adapted from SESLHD Centre for Coaching, Coaching Skills for Health Professionals 2018

Useful Mentoring Questions

Type	Example
Open-ended question (gives choice in answer):	What do you feel/think about the way in which that happened?
Closed-ended question (no choice in answer):	Did you notice anything about that?
How question (elicit information/details):	How often has this happened? How have you managed in the past?
What question:	What happened? What did you do?
When question:	When will you talk with her/him? When do you expect to be told about...?
Where question:	Where did you first encounter that?
Why question:	Why is that important to you?
Clarification question:	When you say...what do you mean?
Elaboration question (opportunity to expand):	Is there any other information that you would like to add? Can you tell me a little bit more about that?
Challenging question:	What makes you suspect that...? How might someone else see the situation?
Specific Detail question:	How frequently does that happen?
Request for Example question:	Can you give me an example of what happens when...?
Miracle question: (helps avoid the 'yes buts')	If the problems that you are experiencing are solved, what will be different that will tell you that this has happened. What will things look/sound/feel like?
Scaling question	On a scale of 1 - 10, where 10 reflects...and 1 reflects...where would you say you are? What would it take for you to move one point higher, reach number 10 etc.?
Exception question	Can you think of a time when you did not feel...? Or when you were able to...? What was it about these times that enabled you to...?
'Show me' question:	Can you show me what you did?
Eliciting Personal Meaning question:	What do you make of that? I'm wondering about the meaning of that for you?
Establishing Agenda question:	You've mentioned 3 areas that are of concern to you – which one would you like to discuss first?
Future Oriented question:	What would it take for things to be different? What would it take to make it possible?
Confronting Ambiguity	You say that you want things to change and yet you also say that you are not willing to try something different...? Can you tell me some more about that?

Mentoring Partnership Discussion Guide

Over time the focus of the mentoring relationship may change and the identified goals of the mentoring relationship may need to be reviewed. Use the following questions as a guide and discuss your answers to these questions. Consider any adjustments you would like to make that will be beneficial for your relationship.

Overall, how are you finding the mentoring relationship?

What is working well?

What, if anything is not working as well as expected?

What are you both gaining from this experience?

What is the most beneficial aspect of the mentoring relationship for the mentee and mentor?

What external factors are affecting the mentoring relationship? How might these be resolved?

Mentee & Mentor Session Reflection Questions

- These questions can be used to reflect periodically on how the mentoring sessions are flowing, and identify and address any emerging issues.
- How did the last session begin?
- What did the mentee bring to the session in the form of preparation?
- Did the session follow the mentee's agenda?
- Were any deviations from the mentees agenda acknowledged and negotiated?
- What was the balance between listening, support, information and challenge from the mentor?
- Was this balance appropriate and did it meet mentee needs?

Common Mentoring challenges and suggestions to resolve

If you experience any of the following challenges, here are some tips for working through them:

Challenge	Tips for working through
Time commitment	Assess the time needed for sessions and realistically plan for it. Consider options for using phone, Skype and email check ins between sessions.
Strained relationship	Discuss feelings, agree on boundaries for the necessary levels of empathy, support and commitment.
The 'halo' effect	Sometimes mentees can attribute a 'halo' effect to the mentor, whose opinions may risk being seen as 'absolute' answers. Openly discuss if this occurs and diffuse this tendency.
Jealousy	Other colleagues may become jealous of close mentor/mentee relationships. If perceptions occur that the mentee is receiving an unfair amount of attention it is important to manage this to diffuse resentment.
Criticism of mentee by mentor	Mentor and mentees should be aware of the sensitivities of the mentee to criticism and take care with formal, informal, verbal and non-verbal feedback. Discuss problems analytically without reference to personality.
Personality mismatch	Respect for each other is essential for a positive mentoring relationship. Sometimes a personality mismatch can occur. If this arises, discuss your concerns with your Mentor. However, if you are unable to resolve your concerns the best way forward for you both is to conclude the mentoring relationship.

The Good Mentoring Toolkit for Healthcare, 2004, Helen Bayley, Ruth Chalmers & Caroline Donovan

Goal Progress Worksheet

Goal	Progress	Helping/Hindering	Questions for Mentor	Actions

Mentoring Session Log

Use this template to keep on track with you planned session dates and as a record of number of sessions held.

Session Date & Time	Venue	Signed
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:
		Mentor: Mentee:

Reference List

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<http://www.springboard.health.nsw.gov.au/sat/>

<http://sdps.ucdavis.edu/toolkits/mentoring/Preparing%20for%20Closure.html>

For additional support please email:

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