

Mentoring Program Toolkit and Handbook





Mentoring Toolkit

Building Connections

This mentoring toolkit is designed to provide mentors and student mentees with a guide for building their mentoring relationships.

2012

**New Careers in Nursing
Mentoring Program Toolkit
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MENTORING PROGRAM TOOLKIT PURPOSE

This Toolkit is designed to guide NCIN grantees in fulfilling the grant requirements of a mentoring program, and meeting and sustaining the leadership and mentoring requirements of the scholarship grants (See Appendix) from the Robert Wood Johnson Foundation. The recommended activities are designed to support Nursing School faculty members in assisting New Careers in Nursing scholarship recipients and nursing students with support and structured opportunities to prepare the students for the rigor of an accelerated nursing program.

The Toolkit will complement the orientation activities and leadership and mentoring activities offered by the Schools of Nursing.

MENTORING PROGRAM TOOLKIT OBJECTIVES

The objectives of the Mentoring Program Toolkit are to:

- Address the self-identified needs of RWJF scholarship recipients as they begin accelerated programs of study.
- Provide information and guidance on implementing mentoring support for RWJF scholars during their attendance in an accelerated nursing program.
- Provide turnkey instructional options for mentoring activities for grantee schools,
- Provide support and structured opportunities to increase scholars success as they enter the accelerated nursing program and ensure retention as they move into the nursing profession.

MENTORING PROGRAM TOOLKIT FORMAT

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

HOW TO USE THE MENTORING PROGRAM TOOLKIT

The Toolkit begins with an Mentoring Program Assessment that allows you to get a quick view of where your school stands currently with respect to the mentoring support that is provided to students as they enter your accelerated program.

The Toolkit includes a Basic Mentoring Plan, which contains all the foundational steps that are integral to the students' continued success as they move into and through your program. Your Mentoring Plan must include, at a minimum, the following components: learner-centered mentoring model, the definition of mentoring, the mentoring process, information about setting the mentoring relationship, a goal setting exercise, a framework for mentoring meetings, a means for reflecting and evaluating the mentoring relationship and information about closing the mentoring relationship.

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

DESIGNING A MENTORING PROGRAM

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

Once you have completed the Mentoring Program Assessment, you will have a sense of the level of mentoring support you provide and the available resources that will shape the Mentoring Program that you can provide for the students.

Your responses on the Mentoring Program Assessment will indicate how you might use the Basic Mentoring Program included in this toolkit.

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

Once you have your plan outlined, submit it to the NPO using the Mentoring Plan Submission Form in the Appendix, page 40. View a sample Mentoring Plan in the Appendix, page 44.

MENTORING PROGRAM ASSESSMENT

This assessment is intended to provide you with an opportunity to gain a quick understanding of the school’s level of mentoring support provided to students. Your results will indicate how you might use the Basic Mentoring Program included in this toolkit. The assessment will give you a sense of where your organization stands at this point in time. You will be able to identify areas where you will need to shift the mentoring support you provide by determining how you want to convert your “no” response to a “yes.”

Because an organization’s level of mentoring support can shift based on changes made to your school’s administration and faculty as well as the students in each program, annual assessments of the mentoring program are helpful in determining if the scope continues to be appropriate or may need to be adjusted.

A. Mentoring Program Activities: Mentoring is a support mechanism that greatly enhances a student’s success in accelerated learning environments.	Yes	No
1. Do you have an ongoing mentoring program for your students?		
2. Do you have a specific mentoring model that you follow?		
3. Do you have an individual or individuals designated as a mentor program director/liaison/program manager with whom mentors and mentee can go with questions?		
4. Do you have a process for selecting or recruiting mentors?		
5. Do you have a process for matching mentors and mentees?		
6. Do you provide your mentors and mentees with an understanding of the mentoring program and relationship they are creating?		
7. Do you require both your mentors and mentees to prepare for the mentoring relationship?		
8. Do you specifically provide time for the mentors and mentees to meet?		
9. Do you have specific or stated requirements for the content or activities conducted during the mentoring meetings?		
10. Do you require the mentors and mentees to establish learning goals to be achieved during the mentoring relationship?		
11. Do you evaluate the mentoring program and the mentors from time to time?		
12. Do you have a means to resolve mentor relationship difficulties?		
13. Do you have a means to change mentors should the need arise?		
14. Do you provide the mentors and mentees with a format for closing the mentoring relationship?		
15. Do you have a closing process built into your mentoring program once the mentoring program ends?		

MENTORING PROGRAM ASSESSMENT (CONTINUED)

B. Mentoring Program Support: Ongoing programmatic support is critical so that the mentoring program that can support the student’s learning experience and success in the transition from nursing student to nursing leader.	Yes	No
1. Do you conduct periodic check-ins or evaluations of the mentoring process to determine if the relationship is working for both the mentor and the mentee?		
2. Do you have a process for dealing with issues that may arise in the mentoring relationship?		
3. Do you have an individual or individuals designated to help mentors and mentees work out issues that may arise during the mentoring relationship?		
4. Do you have a pool of mentors to draw from should you need to change mentors or replace a mentor who has left the program during the mentoring relationship due to illness or other unavoidable events?		
5. Do you have a closing process for the mentors and mentees once the mentoring program ends?		
6. Do you provide the mentors and mentees with networking opportunities?		

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

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

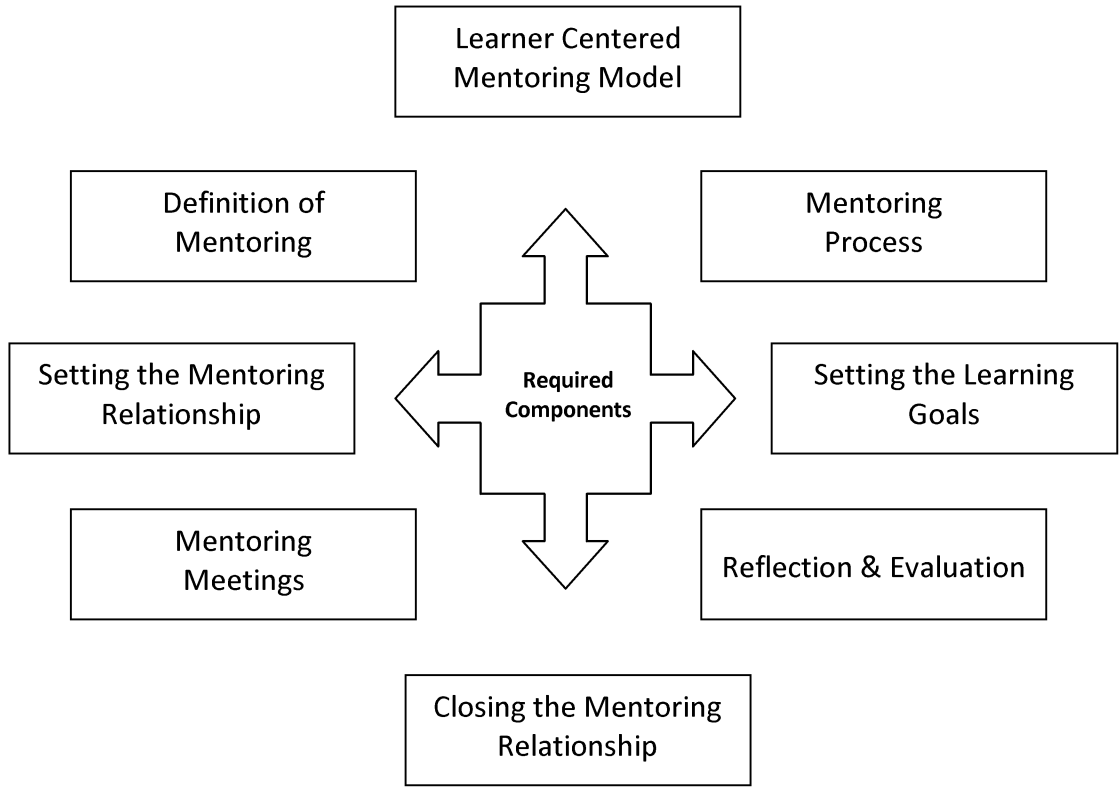
*Adapted from Organizational Self-Assessment by Antonia Villarruel, PhD, RN, FAAN.

MENTORING PROGRAM DESIGN PROCESS

MENTORING PROGRAM ASSESSMENT
Assess the level of mentoring support your school provides to determine the scope of your mentoring program.



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



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

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

- ◆ The Mentor's Guide: Facilitating Effective Learning Relationships, Zachary, Lois J. (Jossey-Bass 2000).
- ◆ The Mentee's Guide: Making Mentoring Work for You, Zachary, Lois J. with Fischer, Lory A. (Jossey-Bass 2009).

PART I: MENTOR RECRUITMENT

Section One: Introduction

The students who attend your school of nursing will come from diverse cultures, family histories and economic situations. One thing they all have in common is a desire to transition from what they were doing previously into the field of nursing. They will all bring a host of life experiences and knowledge that they will want and need to connect to what they are learning in your program.

There is a level of excitement as well as a level of anxiety associated with transition, and in particular, transition at an accelerated pace. In addition to the orientation activities you provide, you can further ensure the students' success by providing a strong mentoring program that will support them during the time they are in your program.

Mentor Recruitment — Action Items
A. Mentor Recruitment Process
B. Identify Potential Mentors
C. Select Mentors
D. Meet with the Mentors

Section Two: Mentor Recruitment

A. Mentor Recruitment Process

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

1. Identify your goals.	<ul style="list-style-type: none"> ◆ Consider why you want mentors for the students. ◆ Define what you hope to achieve as the end result of the mentoring for the students.
2. Create a list of criteria.	<ul style="list-style-type: none"> ◆ Identify the qualities you want in a mentor.
3. Determine qualities that are "must haves." (Musts)	<ul style="list-style-type: none"> ◆ Select those requirements that are non-negotiable from your list.

4. Rank the remaining criteria. (Wants)	◆ Rank the order of the remaining criteria in order of importance to you.
5. List possible options.	◆ Brainstorm a list of possible mentors (see Identifying Potential Mentors below).
6. Eliminate options that don't meet the "musts."	◆ Evaluate each possible mentor against the "musts." If they cannot fulfill them, do not consider him or her further.
7. Rate each option against "wants."	◆ Compare how well each of the remaining options stacks up against your "wants." Assign a numeric rating (e.g., 1–10) for each potential mentor to measure how well he or she measures up against each "want."
8. Make the decision.	◆ Tally the numeric score to identify which of the candidates best meets your desired end result based on the criteria you established.
<p>Source: Adapted from <i>The Mentor's Guide: Facilitating Effective Learning Relationships</i>, Zachary, Lois J. (Jossey-Bass 2000).</p>	

B. Identify Potential Mentors

Mentors should be chosen with care. Look to the faculty and the profession for those individuals you think could offer the students the most growth opportunity. Be mindful of the diversity of your students and find diverse role models.

Use the following guidelines to locate and identify potential mentors:

- ◆ Use faculty networks to reach out in the community.
- ◆ Follow up with people your faculty already knows; they can tap into their networks, expanding your pool of potential mentors.
- ◆ Look for and approach successful people that have achieved what you hope your students might achieve.
- ◆ Reach back into history — contact faculty from your faculty's nursing school days or other people that faculty met as they were entering the professional field.

C. Selecting Mentors

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

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

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

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

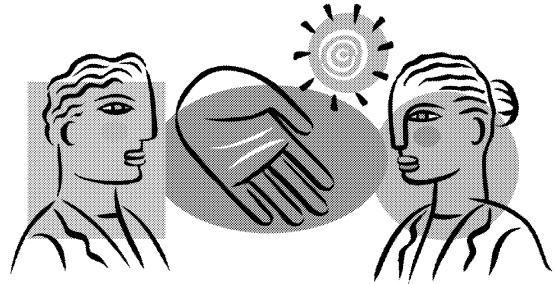
Provide your potential mentors with the following handouts so that they can understand what you are asking of them: Mentoring Requirements (**note: you should amend this handout to fit your criteria**), The Learner-Centered Mentoring Program Model, and The Mentoring Process. The handouts can be found on the three pages that follow (pages 13-15).

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

MENTORING REQUIREMENTS

WHAT IS MENTORING?

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



WHAT YOU ARE ASKED TO COMMIT TO:

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

WHAT YOU CAN EXPECT TO GAIN:

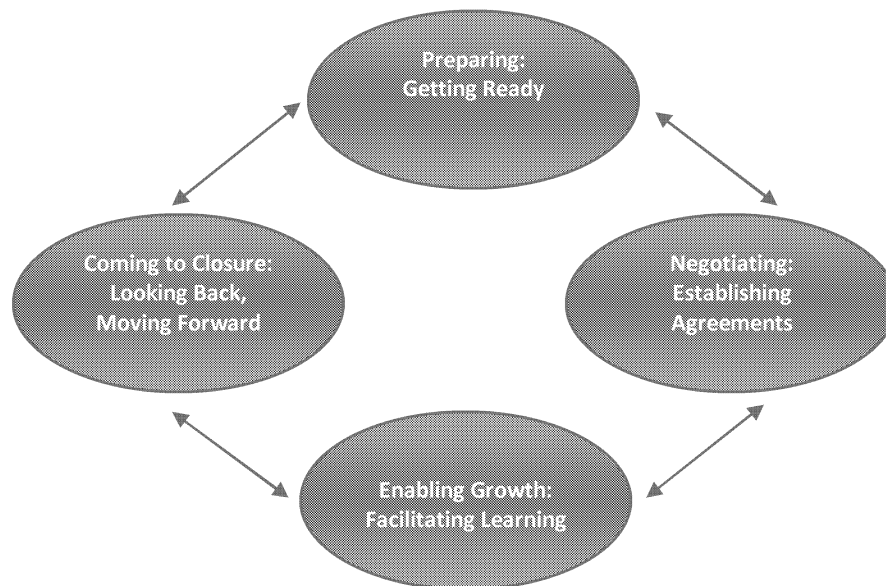
- ◆ A relationship with a new person.
- ◆ Pride in being a part of someone else's growth and development in the nursing profession.
- ◆ Insights on how others struggle with issues and make choices.
- ◆ Practice in listening and giving feedback.
- ◆ Practice working through issues with others.
- ◆ A chance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

THE LEARNER-CENTERED MENTORING MODEL

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

*Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships, Zachary, Lois J. (Jossey-Bass 2000).

THE MENTORING PROCESS



Preparing: Getting Ready

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

Negotiating: Establishing Agreements

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

Enabling Growth: Facilitating Learnings

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

Coming to Closure: Looking Back, Moving Forward

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

D. Meet with the Mentors

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

PART II: INTRODUCING THE MENTOR PROGRAM

Section One: Introduction

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

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

Section Two: Introductory Session and Mentor Matching

Introducing the Mentor Program — Action Items
A. Mentoring Program Introductory Session (including Sample Agenda)
B. Mentor Matching Requests

A. Mentoring Program Introductory Session

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

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

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

MENTORING PROGRAM INTRODUCTORY SESSION - SAMPLE AGENDA

APPROXIMATE TIME	ACTIVITY	LEAD	RESOURCES
5–10 minutes	<p>Welcome — Introduction to Mentor Program. The objectives for today are:</p> <ol style="list-style-type: none"> 1) To hear about the program and its requirements; 2) To get to know each other a little bit; and 3) To get your input into the mentor matching process (mentors and students will give us their top three choices and we will do the matching and let you know who you will be working with for the next several months)! 	Dean, Program Liaison	
	<p>Review of Agenda/Logistics — cell phones off, location of restrooms.</p>	Program Liaison	
10–20 minutes (depending on group size)	<p>Student Introductions/Mentor Introductions — each person gives their name, where they have been working/are working.</p>	Program Liaison	
30 minutes	<p>Overview of Mentoring Handbook</p> <ul style="list-style-type: none"> • Review the Mentoring Model; • Review Mentoring Process; • Review Mentoring Agreement; • Ask mentors and student mentees to review the Mentoring Handbook so that they complete the necessary pre-work required before the mentoring meetings start AND so that they understand what they will need to do to complete the program successfully. 	Program Liaison	Handout AACN Mentoring Handbook (see appendix)
35 minutes	<p>Getting to Know You Exercise — Participants get to introduce each other so that they begin to get a sense of what each person brings to the program.</p>	Program Liaison or Faculty Member	Page 20, including handout
(depends on group size)	<p>Speed Matching — Participants pair up and engage in a 5–10 minute conversation about the information they shared about themselves in the Getting to Know You Exercise. Hold successive 5–10 minute rounds until all potential mentors have met all student mentees.</p>	Program Liaison or Faculty Member	Page 24, including handout
15 minutes	<p>Matching Requests — students each give their top three choices of mentors; mentors give their top three choices of students — matching done by the school; assignments communicated to mentors and students by the school within a week.</p>	Program Liaison	Handout Matching Request Form, Page 29
5 minutes	<p>Close</p>	Program Liaison	

1. Getting to Know You Exercise

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

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

GETTING TO KNOW YOU EXERCISE FACILITATION GUIDE

PURPOSE

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

RESOURCES NEEDED

- ✓ Interview Protocol Handout

PROCESS

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

Setting: Any

Preparation

- Make enough copies of the handout for all participants:

Interview Protocol Handout

- Review the handout and familiarize yourself with the content to be presented.

Step 1. Getting a Sense of Who is Here. (5 minutes).

Open with the following or similar comments:

You all will be engaging in the mentoring program that will provide support to the students going through the accelerated nursing program for the next ____ **(fill in the number)** months. This exercise will give you a sense of who is in the room today and allow you to have some input into the mentor matching that will take place.

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

Step 2. Interview Protocol (10 minutes)

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

Distribute the Handout (Interview Protocol Handout) and tell the group:

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

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

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

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

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

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

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

Step 5. Close

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

GETTING TO KNOW YOU EXERCISE INTERVIEW PROTOCOL HANDOUT

Timing:

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

Groups of 3 get 2 minutes to interview each person — 6 minutes total.

Suggestions:

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

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

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

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

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

2. Speed Matching Exercise

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

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

SPEED MATCHING EXERCISE FACILITATION GUIDE

PURPOSE

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

RESOURCES NEEDED

- ✓ Is It a Match? Handout

PROCESS

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

Setting: Any

Preparation

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

Step 1. Mentor Matching. (5 minutes).

Open with the following or similar comments:

Now that you've heard some general information about the people in the room, we are going to move you into 1:1 conversations so that you can get a little more information about each other. You should remind each other of your information that was shared with the group and explore a bit more — taking the conversation wherever you want.

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

Step 2. Speed Matching Conversations (5–10 minute rounds)

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

Distribute the Handout (Is It a Match? Handout) and tell the group:

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

The handout contains questions that each of you should think about as you have your conversation. Prior to making your mentor requests (which you will do before you leave today), you will need to reflect on these questions based on the conversations you had during this exercise.

Begin the conversational rounds.

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

Step 3. Close

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

IS IT A MATCH? EXERCISE HANDOUT

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

IS IT A MATCH?
◆ Will this person challenge me to raise the bar for myself?
◆ Does this person listen well?
◆ Does this person have a sincere desire and willingness to mentor?
◆ Will this person encourage me as well as provide honest feedback?
◆ Does this person have the knowledge and expertise I need (learning fit)?
◆ Is this person a positive role-model?
◆ Will this person have sufficient time to mentor me?
◆ Is this person accessible enough (geographically or physically) for my needs?
◆ Are we compatible in temperament and personality?
◆ Will I feel comfortable learning and interacting with this person over an extended period of time?

Source: Adapted from *The Mentee’s Guide: Facilitating Effective Learning Relationships*, Zachary, Lois J. (Jossey-Bass 2000).

B. Mentor Matching Requests

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

The Matching Request Form follows on the next page.

MATCHING REQUEST FORM

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

My name is: _____

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

_____ **because**

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

_____ **because**

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

_____ **because**

PART III: THE MENTORING RELATIONSHIP

Section One: Introduction

Once you've made the mentoring matches, it is up to the pairs to start working through the AACN Mentoring Handbook you provided in the Mentoring Program Introductory Session (see appendix).

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

Section Two: The AACN Mentoring Handbook

The AACN Mentoring Handbook is the guidebook for the mentoring relationship that the mentor and student mentee create together. The Handbook outlines the complete process for the mentor and student mentee to follow from the beginning of their relationship to its completion. Helpful resources are included in the book so that both the mentor and student mentee can build mentoring and communication skills as the student mentee's learning and development take place.

The Handbook contents include the following sections:

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

Section Three: Mentoring Relationship Issues

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

Review with the mentor and mentee if they:

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

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

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

PART IV: EVALUATING AND CLOSING THE PROGRAM

Section One: Introduction

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

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

Section Two: Mentoring Program Closing Session

MENTORING PROGRAM CLOSING SESSION — SAMPLE AGENDA

APPROXIMATE TIME	ACTIVITY	LEAD	RESOURCES
5–10 minutes	<p>Welcome — Introduction. The objectives for today are:</p> <ol style="list-style-type: none"> 1. To close out the mentoring program; 2. To share some of what both the mentors and student mentees have learned from the process; and 3. To get your feedback on the mentoring program so that you can help improve it. 	Dean, Program Liaison	
	<p>Review of Agenda/Logistics — cell phones off, location of restrooms</p>	Program Liaison	
10–20 minutes (depending on size of group)	<p>Student Introductions/Mentor Introductions — mentors and student mentees introduce each other with one sentence each.</p>	Program Liaison	
30–45 minutes	<p>Program Take Aways — Have the group individually reflect on what they have learned through the mentoring process (maybe 1-2 minutes). Let anyone volunteer to begin the sharing (or pick someone if no one volunteers) and continue until all have shared.</p>	Program Liaison, Mentors and Student Mentees	
	<p>Evaluations — Ask the mentors and student mentees to provide feedback on the program so that they can be a part of its improvement. Hand out the evaluation forms.</p>	Program Liaison or Faculty Member	Handout Evaluation forms, Pages 30–32
5 minutes	<p>Close — Have the Program Liaison and/or Dean thank the mentors and student mentees for their participation in the program. Give out certificates or gifts (if applicable).</p>	Program Liaison	Optional: certificates and/or gifts

Section Three: Evaluation Forms

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

MENTOR EVALUATION FORM

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

Mentor's Name: _____

I mentored the following student mentee(s): _____

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

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

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

The support level from the Mentor Program Liaison was appropriate (circle one): YES/NO

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

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

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

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

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

STUDENT MENTEE EVALUATION FORM

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

Student Mentee's Name: _____

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

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

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

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

The support level from the Mentor Program Liaison was appropriate (circle one): YES/NO

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

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

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

I learned the following about myself during the program: _____

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

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

STUDENT MENTEE EVALUATION FORM (CONT'D)

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

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

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

If yes, why? _____

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

General Comments

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

Mentoring Toolkit

Appendix

ELIGIBILITY & SELECTION CRITERIA

The *Robert Wood Johnson Foundation New Careers in Nursing* is a scholarship program to help alleviate the nursing shortage and increase the diversity of nursing professionals.

To be eligible, applicant institutions must:

- offer an entry-level accelerated baccalaureate nursing program or master's nursing program for non-nursing college graduates; and
- be accredited by a nursing accrediting agency recognized by the U.S. Department of Education.

Preference may be given to those applicants that may be either public entities or nonprofit organizations that are tax-exempt under Section 501(c)(3) of the Internal Revenue Code.

RWJF is committed to programs that embrace racial, ethnic and economic diversity. Applications should address the applicant's past achievements and future plans to recruit and retain a diverse student body.

Successful applicants must demonstrate that scholarship funds will be used to:

- assist in the recruitment and expansion of student enrollment in entry-level accelerated baccalaureate nursing programs and/or master's nursing programs for non-nursing college graduates;
- leverage the expansion of faculty resources for these professional nursing programs; and
- **offer mentorship and leadership development activities for scholarship recipients at the award site.**

MENTORING PLAN SUBMISSION FORM



**Mentoring Plan
New Careers in Nursing Scholarship Program
2011-2012 Grant Period**

Submission Date:	
Name of School of Nursing:	
Number of scholarships awarded by RWJF:	
Program Liaison name or contact for this request:	
Email and phone:	

Please email this Mentoring Plan to jjeanty@aacn.nche.edu. If the NPO has questions regarding your submitted plan the specified contact/program liaison listed on this plan will be contacted directly by the NPO.

If you have any further questions please contact the NPO at 202-463-6930 extension 257. Also, if you have any questions regarding the incorporation of the Mentoring Toolkit please contact Dr. Vernell DeWitty, vdewitty@aacn.nche.edu or 202-463-6930 extension 224.

Step One: Assessment

A. Mentoring Program Activities

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

Strengths:

Opportunity for Improvements:

B. Mentoring Program Support

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

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

Identify supports available in school and community

Assets:

Challenges:

Step Two: Mentoring Program Design

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

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

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

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

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

SAMPLE MENTORING PLAN

**Mentoring Plan
New Careers in Nursing Scholarship Program
2011-2012 Grant Period**

Submission Date:	
Name of School of Nursing:	University of Hawaii at Manoa
Number of scholarships awarded by RWJF:	5
Program Liaison name or contact for this request:	Allen D. Hanberg, Ph.D., RN
Email and phone:	ahanberg@hawaii.edu 808.956.3883

Please email this Mentoring Plan to jjeanty@aacn.nche.edu. If the NPO has questions regarding your submitted plan the specified contact/program liaison listed on this plan will be contacted directly by the NPO.

If you have any further questions please contact the NPO at 202-463-6930 extension 257. Also, if you have any questions regarding the incorporation of the Mentoring Toolkit please contact Dr. Vernell DeWitty, vdewitty@aacn.nche.edu or 202-463-6930 extension 224.

Step One: Assessment

A. Mentoring Program Activities

What ongoing programmatic mentoring program currently exists in your organization?

We have established a direct mentoring program with our five scholars, and Registered Nurses that are currently working within the specialty area of each of the scholars masters program track. The scholars meet with their mentors twice a month, one of those meetings is a face to face meeting. In April, the mentors and mentees met together for our April “Linger Longer” for a special mentor/mentee dinner with various mentoring activities included.

Do you have a designated individual/individuals designated as a mentor program director?

Dr. Allen Hanberg serves as the program director for the mentoring program.

Do you have a specific model that you use?

The literature identifies two primary needs of under-represented and disadvantaged students for (a) emotional support and (b) interpersonal communication. The mentoring arm offers skill building and role modeling from the perspective of cultural sensitivity and awareness, and will provide MEPN students with three types of mentors from which to select: (a) professional nurse mentors (nursing professionals who will work closely with the students in nursing practice); (b) peer mentors (pairs of advanced cohorts of the MEPN program will provide mentoring support to peers in the beginning levels); and (c) faculty mentors (faculty members act as mentors to provide emotional and informational support). The students were paired with a mentor at the beginning of the pre-licensure period and the mentors have agreed to support the student until the end of the pre-licensure period.

In addition to the individual mentorships, the program also includes the following activities throughout the NCIN Scholars MEPN program:

1. Dialog with Nursing Leaders: 4 symposia with leaders throughout the pre-licensure year.
2. Building competence and confidence for providing care to diverse populations through 8 hours/month of supplementary simulation lab time to focus on basic skills, medication administration, patient safety, and cultural competency.
3. Skill building for academic success: Participation in IKE AO PONO monthly “talk story” (group discussion) sessions facilitated by Nalani Minton.
4. Academic advising with the director of the MEPN program, Dr. Allen Hanberg.
5. Two meetings per month mentors at the program “Linger-Longers,” and/or one on one.

Do you provide a time for mentors and mentees to meet?

The mentors and mentees meet twice a month.

How do you evaluate the program?

The school monitoring and evaluation process includes electronic course evaluations, clinical site evaluations, simulation-based learning evaluations, and faculty evaluations, with results allowing for rapid revision. Annually, students complete an “experience” survey that gathers information related to their student experience. Information includes perceptions of school organization, faculty preparedness, adequacy of resources, etc. The Dean and Associate Dean meet regularly for “talk story” sessions with students, and the scholars meet monthly with the program director in monthly “Linger-Longers.” SONDH uses this data for quality management at the program and school level. Further, the NCIN scholars complete surveys, interviews, and other activities as designated by the national program.

Mentoring Program Toolkit

Strengths:

1. Monthly meetings with the program director and mentors by means of MEPN NCIN "Linger Longers."
2. Monthly NCIN mentoring activities from the RWJF NCIN Mentoring Program Toolkit and Handbook.
3. Scholars meet twice each month with their mentors.

Opportunity for Improvements:

1. More time dedicated to mentor/mentee relationships.
2. Difficulties in coordinating schedules of all the mentors/mentees, program director, and graduate program directors.
3. Begin mentor selection process much earlier in the program.

B. Mentoring Program Support**What is already happening outside your organization that may impact your mentoring program? Do you have supports in place for mentors and mentees?**

We do have an internal support structure in place that has had an impact on our program. Dr. Stephanie Marshall serves as the Department of Nursing community liaison. She works very closely with our community partners in identifying and selecting mentors for the mentees.

Do you have a pool of mentors to draw from?

Apart from the direct work Dr. Marshall does in cooperation with our community partners, we also have a list of adjunct faculty members that are currently working in the community. We have drawn on this list of faculty members as well for mentor selection.

Do you have a closing process or the mentors and mentees once the program ends?

Yes, once the program ends in August, 2012, the mentors and mentees will complete the Mentoring program closing session as outlined on page 33 of the mentoring toolkit. This will be done at the closing NCIN Linger Longer. They will complete the final component of the mentoring relationship in the MEPN summer celebration where they will be honored as NCIN scholars. They will also be asked to serve as incoming NCIN peer mentors.

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

The internal staff and faculty support of the mentoring program is clearly our greatest strength, this has truly facilitated our ability to connect mentors and mentees. Having the monthly Linger Longers schedule out far in advance has helped in scheduling so many people. The greatest obstacles we have faced are scheduling conflicts, and we have had one mentor that has been very difficult for the scholar to connect with.

Identify supports available in school and community

1. Community partner liaison
2. MEPN/NCIN program coordinator
3. Designated NCIN mentoring program director.

Assets:

1. Monthly meetings with program director and mentors, "Linger Longers."
2. Dr. Stephanie Marshall as community Liaison.
3. Database of adjunct faculty members as some current and future potential mentors.
4. MEPN/NCIN program coordinator.
5. NCIN mentoring program director.
6. Funding to support mentoring activities.

Challenges:

1. Scheduling conflicts with mentors, mentees, and program directors.
2. Scholars study schedule is extremely busy. Finding time for them outside of class time is very challenging.
3. One mentee has had difficulty connecting with his mentor.

Step Two: Mentoring Program Design

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

1. Provide opportunities for emotional support through the MEPN pre-licensure year.
2. Establish and maintain professional nurse mentors.
3. Establish and maintain peer mentors.
4. Establish and maintain faculty member mentors.

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

The schools monitoring and evaluation process includes electronic course evaluations, clinical site evaluations, simulation-based learning evaluations, and faculty evaluations, with results allowing for rapid revision. Annually, students complete an “experience” survey that gathers information related to their student experience. Information includes perceptions of school organization, faculty preparedness, adequacy of resources, the mentoring program, etc. The Dean and Associate Dean meet regularly for “talk story” sessions with scholars, and the scholars meet monthly with the program director in monthly “Linger-Longers.” UHM Nursing uses this data for quality management at the program and school level. Further, NCIN students will complete surveys, interviews, and other activities as designated by the national program.

We will continue to evaluate the outcomes of the MEPN NCIN scholarship awards using two approaches. First, process indicators will track our post award participation in the *New Careers in Nursing* sponsored activities including peer-to-peer forums, online resources for leadership development and mentoring, and monitoring and follow-up of scholarship recipients. Dr. Hanberg, director of the MEPN program, is evaluating the current 5 NCIN scholars in collaboration with the Dean of the UHM Nursing; we expect this will provide quality assurance for this project. The evaluation will include both qualitative and quantitative methods including focus groups and surveys. Dr. Hanberg will be responsible for project activity, participating in the Annual Program Liaison Summit, and reporting to the *New Careers in Nursing* project. Second, the UHF fiscal office will report on the award, and allocation of funds and the project will be included in their internal audit process. UHM Nursing will report on student outcome criteria that will include retention, achievement during the pre-licensure year and MS in nursing program, student program satisfaction, and post-graduation data. Further, we will analyze the student experience survey from the scholar cohort and compare it with the findings for the entire class. Using these results, we will monitor the program and make necessary adjustments. At the completion of the first year, we will make further revisions to prepare for the coming year and revise the MEPN program, student

Mentoring Program Toolkit

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

In addition to meeting the mentoring program objectives, the NCIN scholars will also participate in the following activities:

1. Dialog with Nursing Leaders: 4 symposia with leaders throughout the pre-licensure year.
2. Building competence and confidence for providing care to diverse populations through 8 hours/month of supplementary simulation lab time to focus on basic skills, medication administration, patient safety, and cultural competency.
3. Skill building for academic success: Participation in IKE AO PONO monthly “talk story” (group discussion) sessions facilitated by Nalani Minton.
4. Academic advising with the director of the MEPN program, Dr. Allen Hanberg.
5. Focused leadership development projects from the NCIN Leadership Development Toolkit.
6. Monthly meetings with mentors at the program “Linger-Longers.”

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

Because of the rigor of the MEPN pre-licensure year, and since these scholars are not currently working in a health care related field, mentors for the NCIN scholars were selected for them. This was done with the mentoring program director, Dr. Allen Hanberg, and the Department of Nursing Community Liaison, Dr. Stephanie Marshal. Scholars and mentors were matched based on the specialty track of each of the five scholars and a professional nurse currently working within that specialty track.

Step Three: Program Implementation			
Decisions to Make	Mentor Recruitment	Introducing Mentoring Program	Evaluation and Closing the Program
<p>Activities:</p> <p>The mentoring program for the current cohort is currently active and coming to a close. The only activities we have yet to make are the concluding activities for the final 3 Linger Longers. Activities will be selected from the Mentoring Program Toolkit. The final Linger Longer will, held in August will involve the Mentoring Program Closing Session.</p> <p>Time Frames:</p> <p>Linger Longer with Mentors/Mentees:</p> <ul style="list-style-type: none"> - 05/24/12 - 06/14/12 - 07/26/12 - 08/23/12 <p>Summer Celebration – 08/10/12</p> <p>Resources:</p> <p>In addition to the generous support from the RWJF NCIN scholarship program we have been awarded an additional amount of funding to support the recognition of the NCIN scholars and MEPN students at our summer celebration. \$5000 has been awarded to our program from the University of Hawaii Student Fee's Activities board.</p>	<p>Recruitment for mentors for the 2011/12 academic year is complete. Beginning July, 2012 activities to recruit mentors for the 2012/13 year will begin.</p>	<p>Complete</p>	<p>Linger Longer with Mentors/Mentees:</p> <ul style="list-style-type: none"> - 05/24/12 - 06/14/12 - 07/26/12 - 08/23/12 – Closing Session <p>*Mentor/Mentee evaluation forms will be completed.</p> <p>Summer Celebration – 08/10/12</p>

The NCIN Mentoring Handbook

The NCIN Mentoring Handbook

**Second Edition
September 2012**

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THE MENTORING HANDBOOK CONTENTS

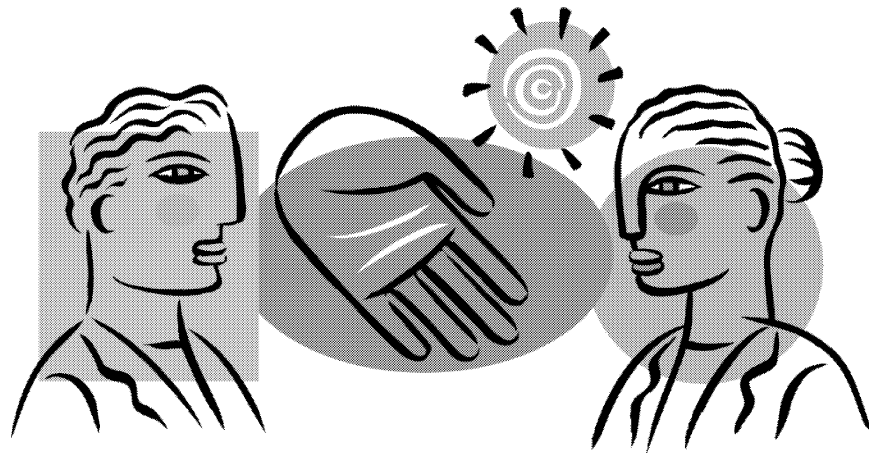
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PURPOSE

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

WHAT IS MENTORING?

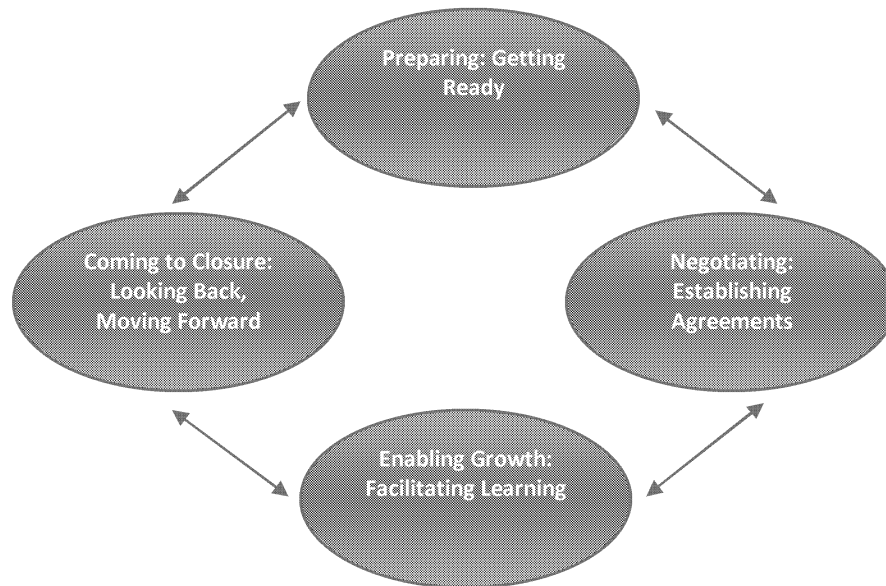
Mentoring is a reciprocal learning relationship in which mentor and mentee agree to a partnership where they will work collaboratively toward achievement of mutually defined goals that will develop a mentee's skills, abilities, knowledge and/or thinking.



THE LEARNER-CENTERED MENTORING MODEL

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

THE MENTORING PROCESS



Preparing: Getting Ready

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

Negotiating: Enabling Agreements

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

Enabling Growth: Facilitating Learning

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

Coming to Closure: Looking Back, Moving Forward

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

Source: Adapted from *The Mentor’s Guide: Facilitating Effective Learning Relationships*, Zachary, Lois J. (Jossey-Bass 2000).

PREPARING FOR THE MENTORING RELATIONSHIP

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

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

To Do List	Strategies for Conversation	Questions to Ponder
1. Take time to get to know each other.	Obtain a copy of each other’s bio in advance of the conversation. If one is not available, create one through conversation.	What kind of information might you exchange to get to know each other better? What points of connection have you discovered in your conversation? What else do you want to learn about each other?
2. Share mentoring stories.	Share your previous mentoring experiences with each other.	What did you like about your experiences that each of you would like to carry forward into this relationship?
3. Talk about both the mentee’s and mentor’s learning and development goals.	Each person should describe their career vision, hopes and dreams, and articulate broad learning goals and the reasons why they are important.	Why does your mentee/mentor want to engage in this relationship? What learning goals would align with each person’s vision of the future?
4. Determine relationship needs and expectations.	Ask each other what he or she wants, needs, and expects out of the relationship.	Are you clear about each other’s wants, needs, and expectations for this mentoring relationship?
5. Candidly share personal assumptions and limitations.	Talk about the mentoring assumptions and limitations you each bring to the relationship. Discuss implications for your relationship.	What assumptions do you hold about each other and your relationship? What are you each willing and capable of contributing to the relationship? What limitations do you each bring to the relationship?
6. Discuss learning and communication styles.	Talk about your personal styles. You may have data from instruments such as LSI, EQi, MBTI, DiSC.	How might each other’s styles affect the learning that goes on in the mentoring relationship?

Source: Adapted from *The Mentor’s Guide: Facilitating Effective Learning Relationships*, Zachary, Lois J. (Jossey-Bass 2000).

MENTOR WORKSHEET

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

- ◆ My mentors were:

 - ◆ At what point in your life did they come into your life?

 - ◆ What were those experiences like?

 - ◆ What wisdom have you gained from each of your mentors?

 - ◆ What did you learn about being a mentor?

 - ◆ What is it you learned that might contribute to your own development as a mentor?

 - ◆ What did you learn about being a mentee?
-
- ◆ What do you need to know about the student you will be mentoring in order to have a better sense of where they are in their life?

 - ◆ Is there more information you need, what questions will you ask the student? What information can you gather from other sources?

 - ◆ What insights do you have about the student's life that might affect the student's readiness to learn?

STUDENT MENTEE WORKSHEET

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

- ◆ Describe three to four milestones that contributed to your personal development. Of these, which affected you the most and why?
- ◆ Identify your top three personal and professional successes. Describe the role you played and why you felt each was successful. Which one are you most proud of and why?
- ◆ What were the major personal and professional challenges you faced? Why were they particularly challenging and what specifically did you do to respond or overcome them?
- ◆ How are you different today than you were five years ago?
- ◆ Create a realistic balance sheet of your current personal and professional strengths and challenges. Are you using your strengths? Are there gaps that you need to fill in? Are there challenges that must be faced?
- ◆ What barriers are you creating for yourself? Do you notice any patterns?
- ◆ What false assumptions might you have about your role, your impact, your value or your self-confidence? Is there a difference in how you perceive your impact versus how others perceive your impact?

-
- ◆ Do you have a personal vision? Formulate a general vision if you do not have one yet.
 - ◆ Have you taken steps to realize that vision?
 - ◆ Do you know what steps you need to take to achieve it?

Source: Adapted from *The Mentee's Guide: Making Mentoring Work for You*, Zachary, Lois J. with Fischer, Lory A. (Jossey-Bass 2009).

THE MENTORING AGREEMENT: CREATING A SHARED UNDERSTANDING

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

Goals

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

Note: Use the goal setting information on pp. 12–16 to guide this process.

Roles and Responsibilities

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

Mentor role

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

Student Mentee Role

- Bring forth professional and career issues for discussion
- Make own decisions
- Be prepared to take risks
- Look for new challenges

- Set professional goals
- Take appropriate advantage of professional development opportunities suggested by the mentor
- Share openly with the mentor
- Accept constructive criticism, use feedback wisely
- Disclose frustrations and concerns

Source: Roles adapted from Maximizing Your Mentoring Relationships: Resource Guide, Murphy, Susan (Robert Wood Johnson Foundation, Physician Faculty Scholars Program, National Advisory Committee (2009).

Accountability

- Decide frequency of contact and methods (e.g., 2x/month in person, reachable in between meetings by phone, text, email, skype, etc.).
- Discuss communication styles — Do you think out loud, do you need time to think before responding? Do you prefer face to face, phone, email or some combination of those methods?
- Discuss learning styles — share any assessment (Myers-Briggs, Learning Styles Inventory, DiSC or similar information you may have.
- Discuss how each person likes to receive feedback. **Note:** Use pp. 20–23 to guide the discussion and ultimately how feedback is delivered.
- Discuss length of mentorship and set assessment points — 30, 60, 90 days?
- Discuss process for notifying each other if these agreed upon points need to be altered or changed.

Confidentiality

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

Boundaries/Hot Buttons/Stumbling Blocks

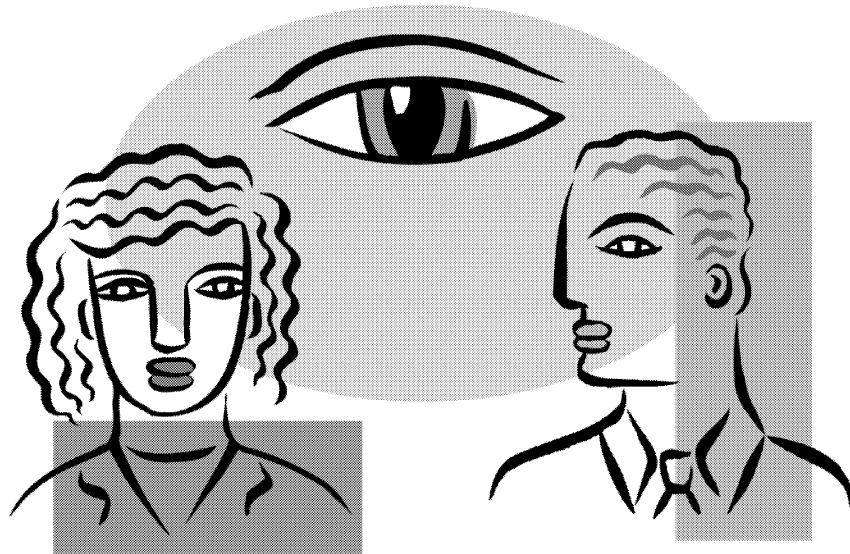
- Discuss and agree on boundaries for the relationship (e.g., meetings and calls only during work hours, after hours, at work, at home, expectations around response times to texts and emails).
- Discuss “what ifs” or stumbling blocks that might come up and identify a process for preventing them from derailing the relationship and/or setting the relationship back into motion if it has become derailed.
- Discuss hot buttons — what sets each person off and determine a process for letting the other person know what a button has been pushed.

- Discuss and identify a process for how to handle hot button or other issues that may arise within the mentoring relationship — Can you raise issues face to face? When might you need to raise issues with the Mentoring Program Liaison?

Closure

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

Source: Framework adapted from *The Mentor's Guide: Facilitating Effective Learning Relationships*, Zachary, Lois J. (Jossey-Bass 2000).



SETTING THE GOALS

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

Why Set Goals?

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

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

SMART GOAL SETTING CRITERIA

A SMART goal is:

- ✓ **Specific** — The goal is clearly identified so that it answers the questions:
 - Who: Who is involved?
 - What: What do I want to accomplish? Is the goal a challenge or a stretch for the mentee and/or the mentor, with a focus on future development?
 - Where: Identify a location, if appropriate.
 - Which: Identify requirements and constraints, if any.
 - Why: Specific reasons, purpose or benefits of accomplishing the goal. Why is the goal important to your development and success?
- ✓ **Measurable** — The success toward meeting the goal can be measured. Measurement is objective and answers the question: How will I know if I've done it?
- ✓ **Action-Oriented and Attainable** — Action-oriented means you must identify the strategy or strategies for how you will achieve the goal. In addition, an attainable goal answers the question: Can the strategies be executed in the time frame I select?
- ✓ **Realistic** — To be realistic, a goal must represent an objective toward which you are both *willing* and *able* to work. A realistic goal answers the question: Am I willing and able to do this?
- ✓ **Timely** — The goal has a clearly defined time frame including a target date. Having a time frame answers the question: When will I achieve the goal?

EXAMPLE:

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

SAMPLE COMPLETED LEADERSHIP GOAL SETTING FRAMEWORK

GOAL SETTING FRAMEWORK			
Goal: What do you want to achieve?	Action Steps/Strategies: What steps will you take to achieve each goal?	Measurement/Objective Evidence: How will you know when each goal is achieved? What will you be doing or saying differently?	Celebration: What will you do to celebrate reaching each goal?
Learn about nursing specialties and shadow a nursing professional in a nursing specialty that interests me by the third month of the program.	<ol style="list-style-type: none"> 1. Identify several nursing specialties by talking with nursing professionals I know or that my mentor has introduced me to. 2. Conduct informational interviews with nurses in those specialties. 3. Identify one specialty that interests me. 4. Approach a nursing professional I know or that my mentor has introduced me to and request the opportunity to shadow that nursing professional for several hours. 5. Discuss my experience with my mentor. 	<ol style="list-style-type: none"> 1. I will keep track of the conversations I have with the nursing professionals and share my progress with my mentor. 2. I will share what I learn from the informational interviews with my mentor and ask questions of my mentor if I don't understand what I have heard. 3. I will speak about the benefits I have received from the shadowing exercise. 	<p>I will celebrate milestones — when the information interviews are done, when the shadowing exercise is done — by going for coffee with my mentor and getting a high five.</p> <p>I will share what I learned about the nursing specialty with other students in the program.</p>
Lead myself in a more visible way by the end of the program.	<ol style="list-style-type: none"> 1. Recognize my values by writing them down. 2. Identify my purpose in pursuing a nursing degree. 3. Share these values and purpose with others. 	I will speak more directly and confidently about my values and my purpose in undertaking this program.	I will treat myself to a dinner out in recognition of the courage it took me to speak more confidently about my beliefs and choices.

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

EVALUATING THE GOALS

Double check that the goals meet the SMART criteria so both the mentor and mentee can hold each other accountable for achieving the goals.

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

Source: Evaluation adapted from *The Mentor's Guide: Facilitating Effective Learning Relationships*, Zachary, Lois J. (Jossey-Bass 2000).

ENABLING GROWTH: FACILITATING LEARNING

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

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

STAGES OF LEARNING AND LEVELS OF COMPETENCE

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

Levels of Competence and the Mentor’s Role

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

Source: Evaluation adapted from *The Mentor’s Guide: Facilitating Effective Learning Relationships*, Zachary, Lois J. (Jossey-Bass 2000).

SUPPORT, VISION AND CHALLENGE

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

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

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

Source: Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships, Zachary, Lois J. (Jossey-Bass 2000).

FEEDBACK

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

Source: Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships, Zachary, Lois J. (Jossey-Bass 2000).

Tips for Giving and Receiving Feedback

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

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

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

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

Ask ● Listen ● Thank ● Reflect ● Follow up

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

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

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

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

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

A gem — constructive & immediately clear; useful to make some changes.	A wolf in sheep's clothes — leaps out to grab you by the throat. No gift at all.	A gut punch — not what you wanted to hear but you realize it is true - & a gift.	A white elephant — not useful at all; the giver says something that has nothing to do with you.	A mystery gift — Not sure what it means, nor what to do about it. It's initially confusing.
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Consider carefully what kind of feedback you are giving. Ask yourself what your intent is in giving it? Do you want to be helpful as a mentor, to deepen a relationship, share a common experience?

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

Source: Adapted from *Feedback is a Gift*, Lundin and Goldsmith and *Overcoming the Five Dysfunctions of a Team*, Lencioni, Patrick.

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

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

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

FAST CORRECTIVE FEEDBACK

- Provide feedback immediately or as soon as possible after the action has taken place. This is the “educable moment”.
- Have the learner point out what s/he is doing well.

- Provide the learner with alternative behaviors.
- Make sure the feedback describes what the person is doing — that it's about the activity, not critical of the person — and *relate feedback to the goal*.
- Whenever possible, provide corrective information before errors occur.
- End on a positive note in order to keep self-esteem intact.

Source: Adapted from Maximizing Your Mentoring Relationships: Resource Guide, Murphy, Susan (Robert Wood Johnson Foundation, Physician Faculty Scholars Program, National Advisory Committee (2009).

MAINTAINING THE MENTORING RELATIONSHIP

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

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

Building Rapport

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

There are two ways to communicate with other people:

- 1) to emphasize the differences between you and other people OR
- 2) to emphasize the things you share.

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

- ◆ *Be approachable* — If you are standing with your arms crossed and an ugly grimace upon your face you will not even have a chance to build rapport because no one will approach you unless they have to--and if they do, they have likely already made a decision about you.
- ◆ *Make eye contact and smile* — When you make eye contact with a person, wait a second and then give them a big, warm, open lipped smile. The concept behind waiting is you are letting this person know that you do not smile constantly, but rather you are smiling at them personally. Hold the eye contact (this does not apply in some countries where prolonged eye contact is considered rude; research is key if you are meeting someone from another culture).
- ◆ *Initiate conversation* — If the other person has not initiated conversation, you can initiate conversation. Remember to maintain a pleasant tone and a moderate speaking speed. Don't let nervousness speed your conversation up!

- ◆ *Be curious* — The idea is to keep the conversation going back and forth with each of you talking. No one person should dominate the conversation. Each of you should be asking interesting and relevant questions.
- ◆ *Listen actively* — Listen actively to what a person says to you. Try to pick up on some subtleties here, as well as some of their common phrases. As they speak to you, make sure to keep your eyes on them (you can look away occasionally, DO NOT appear to be creepy) and nod your head about to indicate you are listening.
- ◆ *Mirroring* — Mirroring is not mimicking. Mirroring means that you may use some of the words or phrases the other person uses, or you may choose to position yourself in the same way the other person is positioned. When people use similar language — whether spoken or body language — the similarities foster rapport building.

Source: Adapted from eHow, How to Build Rapport, Mullis, Robert, (www.ehow.com/how_4784450_build-rapport.html); and Maximizing Your Mentoring Relationships: Resource Guide, Murphy, Susan (Robert Wood Johnson Foundation, Physician Faculty Scholars Program, National Advisory Committee (2009).

Listening

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

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

what they should or shouldn't do or how to do it, but an idea or a bit of information offered in a neutral way becomes something they can identify with and use.

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

Source: Adapted from *Maximizing Your Mentoring Relationships: Resource Guide*, Murphy, Susan (Robert Wood Johnson Foundation, Physician Faculty Scholars Program, National Advisory Committee (2009).

Resolving Differences Constructively

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

Three warning signs are:

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

What Is the Conflict About? The first step for the mentor and student mentee, should they feel something is not working in the mentoring relationship, is to reflect on the issue and see if they can resolve it with these resources. If not, then the mentor and the student mentee should approach the Mentoring Program Liaison.

In determining if they can resolve the conflict, the mentor and mentee should look at what kind of conflict they are having — content or relationship conflict. One of the most common reasons that disagreements evolve into conflict is because we confuse conflicts over actual *content* — a

real issue — with conflicts having to do with the relationship between the two people in disagreement.

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

A relationship conflict centers around what's occurring between two people on an interpersonal level — their feelings, emotions, and perceptions. Relationship conflicts occur when someone believes, for example, that the other person is disregarding him or her, or is not respectful of him or her.

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

Steps for Resolving Conflict

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

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

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

Personal attacks are when differences shift from the issue or opinion causing the conflict to the personalities or individuals involved. Personal attacks are usually highly volatile because they are emotionally driven (by anger or frustration) and based on perceptions about someone's

character or motives. When conflict manifests into personal attacks, the original issues are no longer the problem because the conflict has ceased to be rational and has now become personality-centered. *Outside assistance should be considered when this occurs in mentoring relationships.*

To successfully manage conflict you need to be able to:

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

What to do:

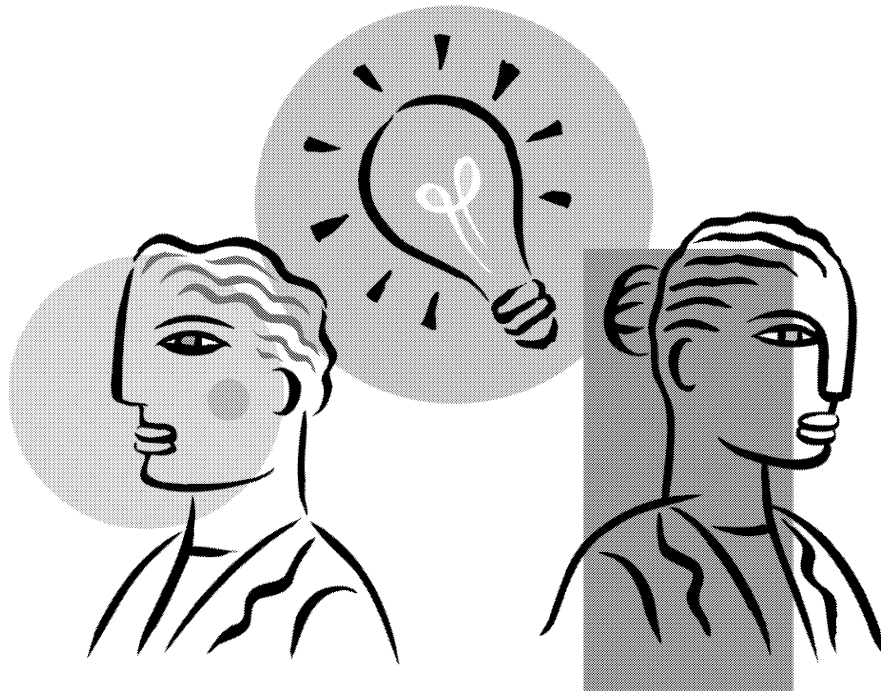
1. Take time to reflect before resolving a conflict. Conflicts do not have to be resolved in the moment, particularly if there are emotions involved.
2. Write down **what** you think the area(s) of conflict are. Be clear and specific.
3. Write down **why** you think these are area(s) of conflict. Identify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

Source: Adapted from Adapted from Maximizing Your Mentoring Relationships: Resource Guide, Murphy, Susan (Robert Wood Johnson Foundation, Physician Faculty Scholars Program, National Advisory Committee (2009) and Johnson, Brad. W., Ridley, Charles R., The Elements of Mentoring (Palgrave Macmillan, NY, NY 2004).

Reflection & Accountability

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

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



MENTORING PARTNERSHIP ACCOUNTABILITY TOOL

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

Mentor: Mentee: Date:	Always	Most of the time	Some of the time	Never
1. We meet regularly.				
2. We do a good job of communicating schedule changes that may affect mentoring meetings.				
3. We notify one another if we cannot follow up or honor our commitments to each other.				
4. We eliminate outside influences and distractions when we meet.				
5. Do we honor our mentoring agreement, including regular reflective evaluations?				
5. We check out our assumptions.				
6. Our communication is clear and misunderstandings are infrequent.				
7. Have we identified sufficient and varied opportunities for learning through the goals we set? Are we making progress on toward achieving the SMART goals that we set? Do we need to do more or reset the goals?				
8. We provide feedback regularly and make sure it is two-way.				

Mentor: Mentee: Date:	Always	Most of the time	Some of the time	Never
9. Have we put in place a variety of mechanisms to ensure continuous feedback? Do we need to add any?				
10. Is the feedback given candid, thoughtful and constructive? What might make the feedback even more helpful?				
11. Our meetings are relevant, focused and meaningful.				
12. We acknowledge and address conflict when it occurs.				
13. We are conscientious about safeguarding confidentiality.				
14. As the mentor, am I providing adequate support to facilitate learning?				
15. As the mentee, am I receiving adequate support that is helping me learn and grow?				
16. Are we continuing to work on maintaining the trust in this relationship? Is there anything that we need to do that would further increase trust?				
17. Are we continuing to build and maintain a productive relationship?				
18. Is the quality of our mentoring interaction satisfactory?				

Mentor: Mentee: Date:	Always	Most of the time	Some of the time	Never
19. Are we continuously working on improving the quality of our mentoring interaction? Do we need to?				
20. Are there things that we avoid discussing during the mentoring relationship? Do we need to address them? Are there any stumbling blocks that we need to address together or with help?				

Source: Adapted from The Mentor’s Guide: Facilitating Effective Learning Relationships, Exercise 6.7 Enabling Questions: A Readiness Checklist, Zachary, Lois J. (Jossey-Bass 2000) and The Mentee’s Guide: Making Mentoring Work for You, Exercise 5.3 Goal Audit, Zachary, Lois J. with Fischer, Lory A. (Jossey-Bass 2009).

CLOSING THE MENTORING RELATIONSHIP

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

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

CLOSING REFLECTIONS

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

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

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

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

Have I integrated my learning?

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

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

How will I celebrate my learning success?

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

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

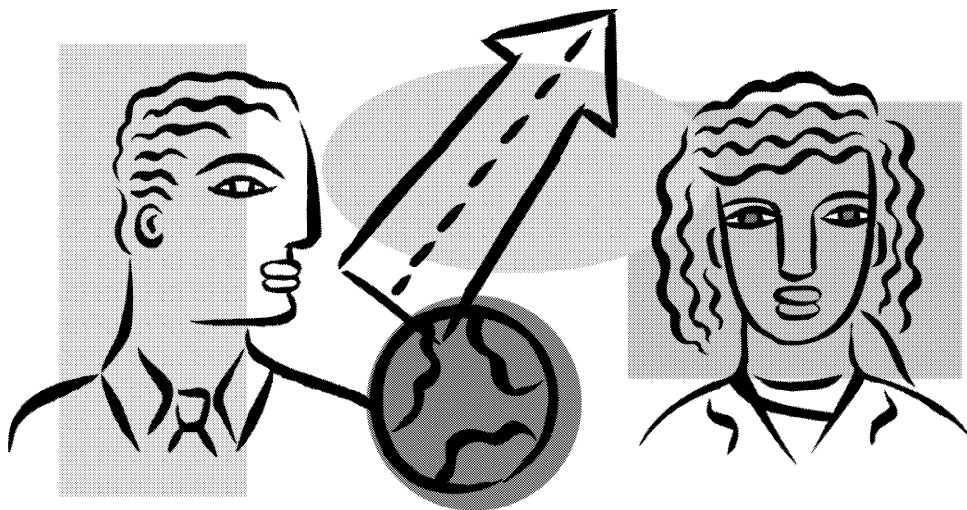
How will we redefine the relationship?

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

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

MOVING ON

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





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