

# Mentee Guide

# Being a Mentee

## Benefits

Mentoring is a unique partnership between two people based on a commitment to the mentoring process. You strive to reach common goals and expectations, maintain focus, and develop mutual trust and respect.

Both the mentor and the mentee give and grow. Mentees can learn valuable knowledge from the mentor's expertise and experiences. You can increase your competencies in specific areas and establish valuable connections with higher-level employees.

Benefits include:

- Gaining an advocate within the organization
- Receiving thoughtful guidance and honest feedback
- Understanding the workplace culture
- Expanding your professional network
- Gaining confidence
- Developing your skill as a *planner* – focusing on what's needed to grow professionally
- Developing your skill as a *learner* – realizing new ways to acquire new skills
- Developing your skill as a *communicator* - improving your ability to express your expectations, goals and concerns

## Responsibilities

Your development depends on exploring your career aspirations, strengths and weaknesses, as well as creating objectives, implementing strategies and evaluating your progress along the way. Learning from the wisdom of your mentor will help produce great outcomes.

As the mentee, you are the driver of this experience and should set the agenda for your meetings. Below are some tips to help your mentoring partnership be a success:

- Be open and honest about your goals, expectations, challenges and concerns and communicate them clearly
- Respect your mentor's time and resources and come to meetings with topics or issues to discuss
- Ask for and be open to constructive criticism/feedback
- Actively listen to what your mentor shares and take short notes of key ideas
- Apply what you learn and let your mentor know how their advice is changing your day-to-day experiences
- Give feedback to your mentor on what is working or not working in the relationship

# Starting the Journey

Your program manager will make email introductions for each mentorship pair.

## Agenda for Initial Contact

Whether via phone, email or Zoom, your first contact, which is mostly task oriented, will lay important groundwork. Before that first conversation, you may want to see what you can learn about your mentor. Try to find them on LinkedIn, or simply Google their name. Then, for that first conversation:

- Introduce yourself, let your mentor know how you prefer to be addressed and ask how they would like to be addressed. Learn how to pronounce their name.
- Share some things about yourself.
- Discuss scheduling needs, expectations and limitations you may have.
- Agree on a meeting schedule (initially every two weeks) and whether you will meet via phone, Zoom or in person.
- Talk about respecting each other's time and how best to cancel or reschedule a meeting. Keep changes to a minimum.
- Agree on how to request impromptu check-ins between meetings.
- End the meeting on a positive note, noting that you are looking forward to working with your mentor.
- Let your mentor know that you will develop an agenda for your next meeting and share it with them in advance.

Relationships take time and work. The first few months of your mentoring experience should focus on building a trusting, respectful relationship.

# Developing the Partnership (0 to 2 months)

The first few months of mentoring will likely be spent getting to know each other. This is the time to clarify expectations for the relationship and to understand each other's skills and perspectives. Do not rush through this phase, as it is critical to the long-term success of the mentoring relationship.

## Meeting Agendas

As the mentee, you will be developing each meeting agenda. The goal is to engage your mentor in meaningful conversation from the start, going beyond job responsibilities and titles and focusing on each other as people – your histories, cultures and interests. You can begin to share some of your personal and professional journey with your mentor and expect that they will reciprocate.

Over the first two months, you may want to work your way through the suggested agendas that follow. Try to describe to your mentor your professional aspirations and development goals. To clearly understand you, your goals and your priorities, your mentor will likely have questions about how your goals align with your career pursuits.

Talk about your personal communication and learning styles and ask your mentor about theirs. Clarify what each of you are hoping for from the mentoring relationship.

Before concluding each meeting, review the agenda and what you accomplished at the

meeting. Talk openly about whether you had substantive versus superficial discussions and whether you believe you are advancing in your level of trust. Finally, agree on next steps and the next meeting agenda.

Remember the goal of this period is to build a strong foundation of trust. This will take multiple conversations over approximately two months.

Before moving on to the next phase, you may want to use the checklist below to assure that you have established a firm foundation of trust and understanding.

## Checklist Before Moving On

- Am I truly invested in my development?
- Are my mentor and I communicating openly and honestly?
- Do my mentor and I understand and agree upon each of our roles in this relationship?
- Can I commit to adequate time for follow-through on assignments?
- Am I gaining trust and respect for my mentor?

Agenda Topic	Conversation Ideas
Introduction	<ul style="list-style-type: none"> <li>• Tell your mentor about yourself and ask about them.</li> <li>• Share a little of your personal journey and ask about theirs.</li> <li>• Talk about each other's current professional situation.</li> <li>• Talk about each other's leadership values and philosophies.</li> <li>• Begin to discuss ground rules that may assist in building the relationship.</li> </ul>
Getting to Know You <i>(multiple meetings)</i>	<ul style="list-style-type: none"> <li>• Share some previous mentoring experiences with each other. What did you like/what didn't you like?</li> <li>• Share why each of you want to engage in this relationship.</li> <li>• Discuss what each of you sees as your role in the relationship and if your views differ, how to resolve or how the differences may impact the relationship. Try to clarify what you, as the mentee, are trying to accomplish.</li> <li>• Describe to your mentor where you see yourself headed in your career.</li> <li>• Share your broad development goals and how these relate to where you see yourself headed.</li> <li>• Discuss your learning style and both of your personal communication styles.</li> </ul>
Ending Each Meeting	<ul style="list-style-type: none"> <li>• Discuss expectations regarding open and honest feedback with one another and ask for that feedback at the end of every meeting.</li> <li>• Agree upon next steps and the next meeting agenda.</li> </ul>

# Defining the Goals (2 to 4 months)

During this phase, try to meet twice a month, if possible. While it is important to continue building the relationship, the focus during this period is committing to a set of goals and developing an approach to achieve them.

You and your mentor may want to detail your goals and other partnership commitments in a written agreement. This can help maintain focus during the mentoring partnership. A sample is included at the end of this section. If you do decide to use an agreement, keep it simple.

## Meeting Agendas

Mentees often have broadly defined goals. If that's your case, too, your mentor can help you make those goals as Specific, Measurable, Achievable, Relevant and Time-Bound (SMART) as possible by asking questions to clarify your goals and objectives.

For example, your goal may be to move into a position with a better title and higher salary within the next year. Your mentor might ask "What do you mean by "better title?" and "What do you think is needed to reach that goal?" Your mentor is not challenging you or questioning the validity of your goal, they are simply trying to define your goal as you do.

Work on examining the gap between your professional goals and what your desired position offers, as well as examining what you bring to the table in relation to what the position requires. This gap analysis can form the basis of an agreed-upon strategic approach to reaching your objectives.

## Checklist Before Moving On

- Goals are clearly defined and understood by both mentor and mentee.
- Mentor and mentee have agreed to meeting routinely, the ground rules for the relationship and the preferred feedback method.
- A strategy is in place that is based on learning objectives, with timelines for completing the work and periodic checks to re-evaluate and modify the plan.
- I remain committed to working toward my goals, working with my mentor and following through on their assignments/suggestions.

[LinkedIn](#) resources are available to assist with effective goal setting.

## Sample Mentoring Partnership Agreement

The goals and objectives of our mentoring relationship are as follows:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

We have discussed the protocols by which we will work in partnership. To ensure that our relationship is a mutually rewarding and satisfying experience, we agree to:

1. Meet regularly. Our specific schedule of contact and meetings is as follows:
2. Look for multiple opportunities and experiences to enhance the mentee's learning. We have identified, and will commit to, the following specific opportunities and venues for learning:
3. Maintain confidentiality of our relationship. Confidentiality for us means:
4. Honor the ground rules we have developed for the relationship. Our ground rules are:
5. Provide regular feedback to each other and evaluate the progress. We will accomplish this by:

We agree to meet regularly until we accomplish our predefined goals or for a maximum of nine months. At the end of this period, we will review this agreement, evaluate our progress and reach a learning conclusion. The relationship will then be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have stipulated mutually agreed-upon goals.

If one of us believes it is no longer productive for us to continue, or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event, we agree to use closure as a learning opportunity.

Mentee's signature and date \_\_\_\_\_

Mentor's signature and date \_\_\_\_\_

# Working Toward the Goals (4 to 8 months)

This period is often considered the most productive part of the mentoring relationship. You have laid a foundation for trust and open communication and committed to ground rules and expectations. You have a mutually agreed-upon strategy in place to aid in meeting your objectives. During this period, you might meet once a month with updates in between.

In this phase, your mentor will focus on supporting and challenging you to help you grow and develop. It is important that you let your mentor know how you are feeling and when you need someone to listen objectively. Your mentor may start asking you questions that will cause you to reflect and articulate your thinking. Ask your mentor if they have had similar experiences and to share relatable stories from their personal journey.

To get the most out of your mentoring relationship, you will need to stretch yourself. Your mentor can assist by challenging you to do things that may fall outside your comfort zone. This can take the form of setting tasks for you, such as:

- Scheduling an informational interview with a senior colleague
- Talking through “what if” questions based on unique scenarios
- Setting high standards that challenge you, trusting that you will follow through

Whatever you do, do not lose sight of your goals, that future state that you want to reach. Also recognize that you may want to talk with your mentor about stepping back and re-evaluating your goals and objectives, possibly reframing them.

Feedback is critical to this time in the mentoring relationship. It is the most powerful way for learning to occur. Remember to provide feedback honestly, making it relevant, practical and specific. Talk about your fears or insecurities, likely your mentor has experienced something similar. Let your mentor help you and support you to achieve your goals. For them to be able to do this, they need your open, honest communication and they need to see that you are working hard toward achieving your goals.

## Meeting Agendas

Your meetings should switch focus from identifying goals to achieving them. Each meeting should begin by reflecting on the previous one. Update your mentor on your current situation, particularly as it relates to your plan and any progress you’ve made toward your objectives: what is working, what is not and how you are feeling about it, etc. Stay focused on the plan and on the partnership, which is your growth and development.



## Checklist Before Moving On

- I am still learning and growing.
- I am still committed to and moving forward in pursuit of my goals.
- The feedback I am giving is honest, thoughtful and constructive.
- We are continuing to build and maintain a productive relationship.
- There are no subjects that seem too difficult to discuss in the relationship.

Agenda Topic	Conversation Ideas
<p style="text-align: center;">Start of Each Meeting (Past Focus)</p>	<ul style="list-style-type: none"> <li>• What did we do at the last meeting?</li> <li>• How do each of us feel about it? Are there things we might have done/said differently now that we have had time to reflect?</li> <li>• Review any action items that were agreed upon.</li> </ul>
<p style="text-align: center;">Majority of Each Meeting (Current Focus)</p>	<ul style="list-style-type: none"> <li>• Provide an update on your current situation, particularly as it relates to the plan.</li> <li>• Provide a progress report on action plan items.</li> <li>• Discuss what's working and what is not working relative to the action plan as it relates to achieving the goal. Discuss how you are feeling about your progress and the plan.</li> <li>• Revise objectives and action plan if needed.</li> </ul>
<p style="text-align: center;">Ending Each Meeting (Future Focus)</p>	<ul style="list-style-type: none"> <li>• Agree on actions to be completed before the next meeting.</li> <li>• Discuss expectations regarding open and honest feedback with one another and ask for that feedback at the end of every meeting.</li> <li>• Agree upon next steps and the next meeting agenda.</li> </ul>

# Phase Out / Closure (Final Month)

As mentioned in the sample Mentoring Partnership Agreement, closure may come at any point during the relationship. The agreement asks both parties to openly evaluate the relationship, and if either party finds reason to end the mentoring partnership, it will be thoughtfully discussed. Both parties go into a mentoring relationship with positive intentions, but sometimes the relationship is not successful. It is important to remember that while your formal mentoring interaction may end, the personal and professional relationship you have built with your mentor can continue to grow. That is, in fact, one of the benefits of mentoring!

Formal closure, even after a successful mentoring relationship, can be challenging and stressful. When one or both partners consider ending the relationship, it is important to discuss it together. Reasons for concluding the agreement can vary, such as:

- One person in the relationship has experienced a life or job change that shifts their attention and ability to focus on the mentoring relationship.
- Although the relationship may have been professionally fulfilling for both, it has successfully run its course and consequently grown stale.

- One or both of you may find it more comfortable to maintain the status quo than to engage in potentially awkward discussions and end up avoiding topics to prevent hurting feelings.

No matter the reason, appropriate closure is important for both parties. It is best to discuss the closure at the beginning of the partnership and periodically throughout the relationship. You may wish to add an item to your agenda every few months to check in on the health of the partnership.

As previously mentioned, the end of the formal mentoring partnership does not mean the end of a relationship, be it as a friend or colleague. Work to have an honest conversation. Provide your mentor with your rationale for terminating the mentor/mentee partnership, listen to what they say carefully and respond to their thoughts in a non-defensive, non-judgmental manner.

As the mentoring relationship is one of learning, growth and development, the partnership's end should also serve as a learning conclusion. The ideal ending conversation should focus on the learning that took place during the relationship – not just the mentee, but also what your mentor has learned. Look at the benefits and challenges of the relationship and make the ending as positive as possible.

## Summarize the Learning

The healthy discussion at closure provides you and your mentor with the opportunity to evaluate the learning outcomes and hopefully discuss how you might build on your learning as you move forward in your career and life. Look back over the goals that you developed early in your mentoring relationship. Then ask yourself what you learned/accomplished relative to each objective. For example, if one of your objectives was to prepare yourself for a position with greater responsibility, describe to your mentor the progress you feel that you made toward that objective.

You may be surprised at what your mentor learned about themselves, as well. Ask them to share what they learned through this relationship. That conversation may go something like this:

*Mentor: I have observed that you have grown more sure of yourself over the past year.*

*Mentee: You know, you're right. I do feel more confident and am now giving my opinions more often at meetings.*

*Mentor: That's terrific! You have taught me a lot about patience and the importance of listening this year. I am finding that my leadership team is being more open with me, so thank you.*

Most of us have had mentors at different points in our lives. Many of them have remained a friend or colleague that we touch base with periodically or think of with fondness from time to time. Ending the formal mentoring relationship should be done in a way that is focused on the future and leaves the relationship open to evolve into something different.

## Celebrating

Most of us don't take the time to celebrate an achievement, often looking at something as done and moving on to the next thing. However, celebration at the end of the mentoring relationship is important as it reinforces the learning that has taken place and helps with transitioning to the next phase, much like a graduation ceremony.

Some suggestions for celebrating may include a face-to-face get-together if you have been mentoring via electronic methods. A written note expressing your gratitude to your mentor can be an expression of celebration, providing a permanent reminder of the relationship and its successes. You and your mentor may wish to exchange a meaningful memento. Any mementos should not be expensive – perhaps a book of reflections that will help continue the learning that began during the mentoring relationship.

## The Future

Take the time to be honest about whether there will be a future relationship.

If you do wish to continue the relationship, agree whether it should be touching base periodically over email or phone or something more formal, such as setting new learning goals and continuing the mentoring experience.

Whatever you agree about the future relationship, know that each of you will likely feel a loss. You have bonded over the past year or so, confided in each other and learned together. Your mentor may worry about you or wonder how you are doing. You may miss the support and feedback your mentor provided. The good news is that you will likely hear from each other when you least expect it over the years. A voicemail, email or note letting them know about an accomplishment may unexpectedly make their day.

Now that you have agreed upon your future relationship with your mentor, it is time for you to do a self-evaluation. See the [self-assessment](#) included in the program resources. Ask yourself: How has this mentoring experience changed you? What did you learn from this relationship? How can you use what you learned in future mentoring relationships? Are you ready to

select another mentor and/or be a mentor yourself?

You learned and/or practiced many skills as a mentee. The first of these was **reflection**: looking at your life, your personal journey, where you have been and where you wanted to go. You started reflecting in preparation for your first meeting with your mentor and honed that skill throughout the entire relationship.

As the agenda setter, you became the facilitator of the conversations, and **facilitation** is key to being an effective mentor in the future. As a mentee you had ample opportunity to practice your listening skills, **listening** to your mentor and reflecting on their words and ideas.

Hopefully you not only received much feedback over the course of your relationship, but you also provided open and honest **feedback** to your mentor during this time as you worked to build a relationship of trust.

The four skills above are the vital tools of a mentor. So, think about your abilities to effectively use these skills. Then answer the following questions: Do you enjoy helping others? Would you like to help another person succeed professionally? Do you enjoy helping others learn more about themselves and set and achieve their goals? If so, consider becoming a mentor.

## Mentee Self-Assessment Worksheet

To be completed before and after your mentoring experience, this self-evaluation is designed to assess your skills, abilities, strengths and weaknesses to manage your career development. You may want to share this with your mentor and request feedback and assistance in developing and strengthening your skills in certain areas.

Please answer by rating your proficiency for each item on a scale of 1 to 5 and answering "Would you commit time to developing this skill?" (Y/N).

<b>Mentoring Relationship Skills</b>	<b>Rating (1-5)</b>	<b>Y/N</b>
Ability to identify and approach individuals for mentoring		
Ability to negotiate and maintain a mentoring relationship		
Setting and achieving goals and timelines		
Ability to mentor less-experienced employees		

<b>Career Development Knowledge and Skills</b>	<b>Rating (1-5)</b>	<b>Y/N</b>
Understanding of promotion criteria		
Clear direction in achieving promotion requirements		
Understanding how to capture and document your work		
Resume/CV preparation skills		
Navigating the organizational/institutional culture		
Joining professional societies		
Enhancing professional visibility (locally and nationally)		
Balancing personal and professional life (work/life balance) skills		

## Mentee Self-Assessment Worksheet

<b>Leadership/Management/Interpersonal Skills</b>	<b>Rating (1-5)</b>	<b>Y/N</b>
Leading and motivating others (in team meetings, committees, etc.)		
Chairing a committee, task force or small group		
Creating and managing a budget		
Managing projects and programs		
Time-management skills		
Organizational skills		
Communicating clearly in writing		
Communicating clearly in conversation		
Communicating clearly in oral presentations		
Networking skills (and creating professional networks)		
Conflict-resolution skills		
Receiving and using feedback from others		
Providing feedback to others		
Negotiating skills (to achieve your career goals and needs)		