MENTORING

A guide and workbook for mentors and mentees

2013-2014

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HOW TO USE THIS GUIDE

THIS GUIDE IS DESIGNED TO INTRODUCE you to your new and exciting role as a participant in the National Science Foundation's Formal Mentoring Program. The hope is that during the year, you and your mentor/mentee will build a working and supportive relationship. This guide will give you an overview of what to expect during your year, prepare you for the types of skills you will need, and provide activities you are encouraged to complete.

It is not intended that you sit and read this entire workbook. Instead, we encourage you to use this resource as a 'toolbox' to support you in your relationship. This toolbox is organized by the six phases of the Mentoring Program (as shown and described below).

NSF's Formal Mentoring Program Roadmap

Planning & Preparation	Initiation	Cultivation	Facilitation	Reflection	Redefinition
Applications Due	Relationships Established	Relationship Development	Individual/Skill Development	Lessons Learned	Next Steps

- **Initiation phase:** The relationships between mentors and mentees are started. Here, mentors and mentees meet, determine how they will use their time together, and share expectations.

- **Cultivation phase:** Mentors and mentees learn more about each other's capabilities and optimize the benefits of being in a mentoring relationship.

- **Facilitation phase:** The mentoring agreement and development plan are implemented. Mentors tailor opportunities for mentees that require them to stretch and challenge themselves – while helping them to overcome these challenges and achieve their goals. Mentees work towards achieving their goals through conversations, materials provided by mentors, learning and development activities, and connecting with other resources.

- **Reflection phase:** The relationships between mentors and mentees changes slightly such that the functions/role of mentors decrease and mentees acts more independently and with more autonomy.

- **Redefinition phase:** The next steps for the relationship are discussed.

Your relationship should be fun, developmental, and challenging. We hope you have a great mentoring relationship this year!

     – The NSF Mentoring Program Team

MENTORING OVERVIEW

> Mentoring is… *the process in which successful individuals go out of their way*
> *to help others establish goals and develop skills to reach them.*
> - Linda Phillips-Jones, Ph.D., *The New Mentors and Protégés*

There is a lot of confusion around what mentoring is, what it's not, and how it compares to coaching, supervising, and training. The chart below summarizes research findings on the nature of mentoring and outlines the basic functions of a mentor. Mentoring is a blend of seven interrelated behavioral functions that have a distinct and central purpose. The combination of the seven functions constitute the complete mentor role.

What? Activities like…	Why? …provides…	When & Where …which is appropriate if…
Facilitative Coaching	a sounding board	an individual can do or solve it him or herself
Guidance	direction	an individual has no idea where to start, or is headed down a dangerous path
Role modeling	vicarious learning	you're highly skilled at something that others have the opportunity to observe
Instructing	knowledge transfer	information needs to be shared and there's only one right answer or way
Advocating	practice	an individual needs to practice new skills
Supporting	confidence	an individual lacks confidence, and you can encourage and motivate them
Career counseling	purpose	an individual is searching for a path and you have an understanding of various paths they can take

Mentor Responsibilities
- Identify the mentoring functions that you can best provide to a given mentee, and communicate this to your mentee.
- Encourage your mentee to find someone who can provide the functions that you cannot provide.
- Make the time to serve your mentee in the ways you can.

Mentee Responsibilities
- Determine the functions any given mentor can provide, and respect his or her limits.
- Find people who can provide the functions your mentor can't.
- Drive the mentoring relationship; set goals, meetings, and prompt discussions.

Mutual Responsibilities
- Clarify expectations by completing a mentoring agreement.
- Define confidentiality appropriately, then maintain it.
- Address problems (e.g., unmet expectations) with one another, rather than ignoring them or expecting them to go away.

NSF Mentoring Program Overview

2013-2014 Program Agenda & Timeline

Throughout the year, the NSF Mentoring Program Team will provide a variety of resources through suggested articles, discussion questions, workshops, networking events, and guest speakers. Below is a schedule of when these resources will be provided – the method varying. Review the list of *Suggested Mentoring Activities That Encourage Career and Relationship Growth* for additional mentoring activities that may be performed throughout the year.

2013-2014 Program Agenda

Phase I
Initiation: Relationship Established (February–March)

☐ Relationship Kickoff Workshop

Phase II
Cultivation: Relationship Development (March–May)

☐ Books 24x7 Information Session & Demo
☐ Myers-Briggs Type Indicator (MBTI)
☐ Insights Discovery
☐ NSF Mentoring Book
☐ 3-Month Program Evaluation

Phase III
Facilitation: Individual/Skill Development (June–December)

☐ 360° Feedback
☐ Ask-A-Mentor Panel
☐ Leadership Book Circles
☐ Getting the Most Out of Mentoring
☐ Coaching for Mentors
☐ 6-Month Program Evaluation
☐ Networking/Social Events
☐ Career Development and Advancement Workshop
☐ Women as Executives Panel
☐ Self, Promotion, and Communication Brownbag
☐ My Career Path Panel

Phase IV
Reflection: Lessons Learned (January)

☐ Reflection Reading and Discussion
☐ Political Savvy Brownbag

Phase V
Redefinition: Next Steps (February)

☐ Program Closeout Event
☐ 12-Month Program Evaluation

SUGGESTED MENTORING ACTIVITIES THAT ENCOURAGE CAREER AND RELATIONSHIP GROWTH

Mentors and mentees may engage in a variety of activities designed to encourage career and relationship growth. Below are a few types of activities you may want to consider. Although these activities are organized by relationship phase, it is up to your discretion when they would be most appropriate in your relationship.

Initiation Phase

- Share details about your work experiences, backgrounds, and personal lives
- Share career stories – Career start, changes made along the way, high and low points, most helpful experiences
- Discuss the pluses and minuses of being in management positions at NSF
- Have a long lunch together
- Discuss end-of-year performance feedback received
- Review the mentee's résumé – Identify what should/could be different about the résumé at the end of the year
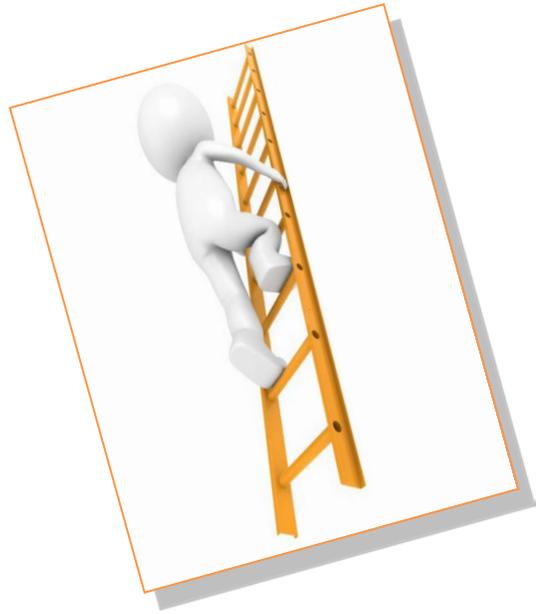
Cultivation Phase

- Identify resources (e.g., training courses) the mentee needs to be maximally productive and practice how to negotiate with his/her supervisor for them
- Share your strategies for success
- Shadow the mentor for a week (e.g., in meetings, relevant discussions)
- Discuss your favorite books and authors.
- Select a relevant book to read and discuss
- Discuss and develop and role play an "elevator speech"
- Share insights into networking, influencing, good courses, how to develop support, how to make a positive impact in the NSF organization

Facilitation Phase

- Research goals and discuss the best way to obtain the knowledge and skills
- Conduct research together
- Co-author an article
- Prepare for midyear performance review
- Assess the current status and progress of the relationship – Develop strategies to resolve any issues if the relationship is off track.
- Engage in assignments that will make the mentee more visible and give him/her key experiences
- Have the mentee write down the picture of a perfect week – what he/she is doing, where he/she is living; and how others talk about him/her. Discuss the results, discoveries, and what can be applied.

Reflection Phase

- Review the mentee's résumé to identify what has changed since the beginning of the mentoring year

INITIATION PHASE:

RELATIONSHIP ESTABLISHED

ROLES AND RESPONSIBILITIES: FOR MENTORS

WHAT IS THE ROLE OF A MENTOR?
The following outlines your roles and responsibilities as a mentor.

Coach
- Helps mentee see issues from a different perspective
- Identifies mentee's leadership style, attitudes, and behaviors that are not helpful
- Increases mentee's awareness on the affect she/he has on others
- Asks probing questions, challenges the mentee's thinking, and explores alternative perspective
- Listens with an open mind
- Gives and receives feedback, as needed
- Fosters strategies to address obstacles that mentees have faced in the past and are facing now

Role Model
- Provides a good example from which the mentee can learn
- Shares information on your own successes and failures, if appropriate
- Leads by example

Instructor
- Assists your mentee in cultivating skills for living and working with people of diverse backgrounds and opinions
- Maintains focus on skill development

Advocate
- Helps mentee develop the connection she/he needs to gain experience
- Helps mentee find information or other resources that might be useful in resolving his/her problem or achieving his/her objective
- Provides and promotes support networks for your mentee both in the workplace and in the community

Supporter
- Gives support as mentee learns by sometimes making mistakes
- Recognizes achievements and celebrates accomplishments
- Encourages the use of resources and contacts
- Promotes the self-esteem and confidence of your mentee
- Empowers your mentee as a leader, professional, and engaged citizen
- Be available to your mentee
- Provides emotional support when needed
- Creates a spirit of mutual learning, trust, and respect

Career Counselor
- Shares views on succeeding at NSF
- Provides opportunities for your mentee to explore career and life choices

DOS AND DON'TS FOR MENTORS

Dos	Don'ts
• Share your mistakes, struggles, and successes. • Invest time in learning about the aspiration, attributes and preferences of your mentee – the better you know your mentee the more detailed guidance you can provide. • Periodically identify special learning opportunities in your organization or in professional networks for your mentee. • Actively assist the mentee in developing his/her own personal network of professional contacts. • Honor any commitments to and confidences of your mentee. • Be clear about purpose, goals, and boundaries. • Periodically validate with your mentee the value of the information and counsel you are providing. • Provide honest and regular feedback to your mentee. • Listen deeply and ask powerful questions. • Maintain and respect privacy, honesty and integrity. • Help your mentee with problem-solving by guiding them through a logical thought process. • Set targets for your mentee and work towards them together. • Remember the 80/20 rule: the mentee should do 80% of the talking.	• Think that you are going to change the world overnight. • Try to solve all the mentee's problems at one meeting. • Promise what you are unable to deliver. • Postpone or cancel meetings unless absolutely necessary. • Jump to conclusions or simply give answers. • Be judgmental. • Forget how important you are to your mentee. • Stray into management – stick to your mentoring role. • Try to inflict your beliefs on a mentee.

ROLES AND RESPONSIBILITIES: FOR MENTEES

WHAT IS THE ROLE OF A MENTEE?

You have entered into a partnership with a mentor who will help you achieve goals. Keep in mind that this relationship needs nurturing from both you and your mentor. Your mentor is not expected to "take care of you" or intercede on your behalf when challenges occur. Your mentor is the person who will help you learn to handle your own challenges.

As your mentor exercises his/her roles and responsibilities, you must also perform several roles and responsibilities:

Be Committed
- Know what is expected from you
- Have realistic expectations of your mentor's time and your ability to achieve your goals
- Be willing to learn and accept constructive criticism

Be an Active Participant
- Seek advice and counsel. Your mentor does not know when you need help
- Actively explore career options and life choices with your mentor
- Listen and observe. Try to keep an open mind, even if you don't agree
- Ask questions. Questioning is a key component in learning
- Ask for clarification. Don't expect to understand everything at once
- Inquire about resources. Your mentor probably already has a network established
- Help problem solve. You learn most effectively by doing
- Make suggestions. You have fresh ideas to share
- Be flexible – only then will you truly grow
- Make sure that you attend all meetings and appointments as scheduled
- Engage in cultivating skills for living and working with people of diverse backgrounds
- Enhance your self-esteem and confidence in partnership with your mentor
- Create a spirit of mutual learning, trust, and respect
- Discuss diverse roles and contribution to society
- Discuss strategies to address obstacles that mentees might face

Practice What You Learn
- Develop your own planning skills. The same methods do not work for everyone
- Develop self-assessment tools. There are long-term benefits from learning to know yourself, your capabilities, and limitations
- Seek out support networks with your mentor
- Assess yourself honestly. Keep in mind - no one is perfect
- Empower yourself to become a leader, professional, and engaged citizen with the support of your mentor
- Follow through quickly when your mentor contacts you
- If problems (e.g., your mentor's unwillingness to meet with you) develop during the course of the program, contact the mentoring team.

Take the Initiative
- Take the lead when it is required
- Look for new ways of doing things and be adventurous in pursuing them

Be Reliable and Persistent
- Show that you can be relied upon to finish tasks
- Finish things on time
- If you cannot get something done, let your mentor know in advance
- Do not give up when things go wrong, use your mistakes as a lesson for how to do it better the next time

Be Focused on Learning
- Be interested in your own learning
- Constantly look for ways to develop yourself
- Be as interested in people skills as technical skills
- Look for feedback and use it

Exhibit Interpersonal Skills
- Understand the impact of your own personality
- Know the impact you make on first meeting
- Understand body language and be careful of mixed messages (words and body language saying different things)
- Always try to understand how people issues impact any problem

DOS AND DON'TS FOR MENTEES

Dos	Don'ts
- Clarify your goals - Show openness to the wisdom of your mentor - Recognize that not everything your mentor says will be usable immediately - Allow your mentor time to respond - Let your mentor know how you are applying his or her advice - Encourage your mentor to be critical - Respect the professional boundaries of the relationship - Support your mentor with others - Talk through disagreements with each other - Ask for help identifying training, development, research or access to key resources - Ask for help in promoting your visibility attending key meetings or co-publishing research	- Depend on your mentor to identify your goals for you - Assume your mentor has unlimited time for you - Get defensive - Talk non-stop - Assume that mentors don't care if you are following their advice or not - Reject what you don't like to hear - Overstep the boundaries without permission - Keep quiet about difficult feelings or issues - Be afraid to ask for help or access to opportunities and resources you see or need - Ask for things that are irrelevant or unreasonable

MENTORING AGREEMENT

Completing your mentoring agreement is the primary activity during this phase. Work through the mentoring agreement (see Appendix A) together to ensure you both understand your roles in the relationship and each other's expectations. The questions you will need to answer include:

- □ Why are we here? What do we both want to gain from this relationship?
- □ What goals will we work on this year?
- □ What specific activities will we engage in to achieve those goals?
- □ When and where will we meet?
- □ Who will schedule meetings and develop the agenda?
- □ How will we communicate between meetings?
- □ How will we exchange feedback?
- □ What information is ok to share with others?
- □ When will we discuss the effectiveness of our relationship?

PERSONAL VISION STATEMENT

As a mentee, you should understand your long-term vision of yourself. A personal vision statement will help provide you with the direction necessary to guide the course of your days and the choices you make about your career. Your vision must be unique to you.

Use the tool below to write your own *Personal Vision Statement*.

Personal Vision Statement
1. What motivates me and brings me joy and satisfaction (personally and professionally)?
2. What are my greatest strengths/abilities/traits – things I do best?
3. What are at least three (3) things I can start doing/do more often that use my strengths and bring me joy?
This is my Personal Vision Statement (in 50 words or less):

Share this vision with your mentor. Then, use this statement to develop goals for this year that will help you achieve this vision.

As a mentee, it is important to set strong goals to achieve your vision, as well as other personal and career goals. You are encouraged to use the "SMART" acronym to write a goal statement that is useful and motivational. Keep in mind that these goals should describe what you want to learn as a result of your mentoring relationship.

An example and worksheet for writing a SMART goal is provided below. Use this worksheet to write your own SMART goal. Then work with your mentor to discuss the nature of your goal (e.g., is it specific enough or realistic). Throughout the year, refer back to this goal to reflect on how far you've come in reaching it or whether it is necessary to make adjustments.

> *Example: By the end of this FY (time-bound), I will be solving problems with my team members effectively (specific) such that they react positively and work collaboratively to find workable solutions (measurable), by learning from, observing, and brainstorming approaches with my mentor (action-oriented).*

Component	Your SMART Goal Component
Specific: What change do you hope to achieve?	
Measurable: How will you know you achieved your goal?	
Action-oriented: What specific steps will you take toward accomplishing this goal?	
Realistic: Why are you capable of accomplishing your goal?	
Time-bound: What is your target date for achieving your goal?	
SMART Goal Statement Summarize the specific goal, the actions you'll take to accomplish it, and the timeframe for completion.	

Be sure to develop at least two or three well thought out goals that will help keep you on track towards accomplishing your personal vision.

DEVELOPMENTAL PLAN

Mentees, once you and your mentor have determined the goals that you will work on during the year, it is important for you to follow up with a development plan to attain those goals. You are encouraged to complete or update your IDP (see Appendix B) to reflect the activities you will engage in throughout the year to accomplish your goals. You may also want to complete the form below – separately for each of your goals – to think through additional behaviors and resources that will help you achieve your goals. Once you complete the form(s), discuss them with your mentor.

Development Action Plan	
Name	Date
Goal	
What tangible outcomes will there be when I have achieved this goal? (*How will I know I did it?*)	
What attitude/skills will I have developed when I achieve this goal? (*This tells you what knowledge/skills/attributes you may want to focus on.*)	
How will I actually gain/build/develop these skills or attributes?	
What resources might I need?	
What problems or challenges might I encounter along the way?	
How will I deal with these problems?	
By when will I achieve this goal?	
What will be the impact on my career when I achieve this goal?	

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*additional copies are located in Appendix C

INCLUDING THE MENTEE'S SUPERVISOR IN THE MENTORING PROCESS

As you discuss the confidential nature of your relationship, be sure to discuss to what degree you will include the mentee's supervisor in the process. Supervisors can be powerful allies for change, and being made aware of the goals the mentee has established can give his/her supervisor the opportunity to be

very supportive. Give careful thought to how you might include the supervisor while maintaining a confidential relationship.

Example Template to Inform Your Supervisor*

Below is an example of how one mentee communicated with his/her supervisor about participation in a mentoring relationship. This mentee was assigned a mentor who worked in NSF's Office of Legislative Affairs. The mentee included the following components in the document: goals, activity proposal, and other potential activities.

Goals

- Gain a better understanding of the legislative process. This will give greater context for understanding how my current duties fit into the bigger picture.
- Learn how the political process works and how it drives policy changes in Congress. This knowledge would be helpful with the interactions I have with my colleagues and with helping others to understand the need to make responses to Congressional inquiries a priority.
- Learn about best practices for communication strategies that are effective and resonate with Congress. This will allow me to add value to my being better equipped to assist with special projects and reports.

Activity Proposal

- As duties permit, with prior approval from you [the Supervisor], undertake one project-at-a-time, that is Congressionally-focused and outside of current job duties. The mentoring program will also include two activities that may expand into other areas, if current workload permits and subject to supervisor's approval:
- Participate in mentoring program in and attend associated meetings designed to explain and illustrate the legislative process.
- Assist with planning and implementing special events on Capitol Hill that showcase NSF's investments in science students and scientific research.

Other Potential Activities

- Help with NSF special events, such as Town Hall Meetings featuring Members of Congress.
- Write talking points for Director and Deputy Director.
- Assist with arranging Congressional briefings
- Develop NSF Fact Sheets on new research investments.
- Prepare background briefing books for NSF's Director and Deputy Director.
- Attend hearings and develop updates on legislation for NSF's web site.

- Write columns for monthly Congressional Newsletter and for the Weekly Wire.
- Write special reports.
- Assist with an External Affairs Communication Workshop.
- Assist with the roll out of a major new NSF initiative or policy.

Consider the following questions to plan the type and level of involvement you both think the mentee's supervisor should have in your relationship.

Discussion Questions
1. How can you involve the mentee's supervisor?
2. Which of the mentee's mentoring goals parallel his/her Individual Development Plan (IDP)?
3. What are the confidentiality boundaries with the supervisor (i.e., which topics will/should be shared and which will/should not be shared)?

CULTIVATION PHASE:

RELATIONSHIP DEVELOPMENT

MENTORING MEETINGS

The first meeting between you and your mentor/mentee may be the hardest or most uncomfortable because you may not have prior experience with one another. Below are a few icebreakers/questions you may consider asking during your first meetings with one another.

The First Meeting
Mentees can ask: • What should I know about you that I would not learn from your biography/résumé? • What are your concerns as we move forward in our mentoring relationship? • How do you foresee this relationship working? • How do you feel about me, as the mentee, driving this relationship? • What challenges might we face in our relationship? • What are your thoughts about my development goals? • What do you value in a working relationship?
Mentors can ask: • What are your concerns as we move forward in our mentoring relationship? • What are your expectations of me as a mentor? • What are your expectations of yourself? • What should I know about you that I would not learn from our mentoring agreement? • What challenges might we face in your development? • What are your interests, hobbies, etc? • What do you value in a working relationship?

MEETING VIRTUALLY

Your meetings may take place face-to-face or virtually. If you or your mentor/mentee teleworks or travels frequently, consider using the following guidelines to continue to build your relationship remotely:

- Try to have a mixture of face-to-face contact and remote sessions.
- Do not leave contact to chance – mark calendars well in advance for telephone calls; go for more structure than less.
- Plan telephone meetings by preparing a clear agenda; be sure to call on time.
- Send a summary of agreements by mail, e-mail, or fax. Mentees should take the lead in summarizing and forwarding these agreements.
- E-mail is another main tools of virtual mentoring and can be a very useful and efficient means of communication, but there also can be difficulties. Here are some pointers on effective e-mail.
  - Always use clear subject headings that refer to the content of the e-mail.
  - Write briefly and succinctly – bullet points can be effective.
  - If responding to an e-mail, quote only the pertinent parts to provide context, not the whole e-mail.
  - Try to address just one issue per e-mail. E-mail does not lend itself to moving through varied emotions/multiple questions in one message. People often read the first part in a message and miss the rest. Send two or three separate e-mails with distinct subject headings rather than putting everything in one e-mail. Help your mentor/mentee focus on the pertinent information.

- o Flag your e-mail only when it is urgent or needs action. If you flag everything as high priority, people will stop paying attention to you.
- o Give as much context as you can, especially in initial e-mails or if you realize that the rhythm or pattern of communication has been broken (e.g., if you are normally very "chatty" with your mentee/mentor and then an e-mail catches you in a crisis, respond by saying: "I am going to be unusually brief as I have an emergency"). This will avoid him/him wondering if he/she upset you. In other words, frame the message within the context of what is happening to you.

FACILITATING STRUCTURED MEETINGS

It is important to manage your meetings together to ensure your discussions achieve your meeting objectives and the meetings run on time. Successfully facilitating meetings is a skill you must learn and practice. A few tips include:

- Prepare an agenda and provide a copy of the agenda to your mentor/mentee to allow him or her to gather his/her thoughts prior to the meeting.
- Begin each meeting with an icebreaker.
- Follow the agenda as closely as possible to stay on task, while recognizing valid "detours".
- Listen carefully and synthesize the discussion as appropriate.
- Agree on next steps and recap meeting accomplishments at the end of the meeting.
- Thank your mentor/mentee for his/her contributions and help in accomplishing the meeting objectives.

Discussion Questions
Think back to a recent meeting you have observed (if necessary, consider observing a meeting prior to engaging in this discussion). Discuss the following questions with your mentor.

1. Was the facilitator of the meeting effective? Why or why not?
2. How did the facilitator begin and end the meeting? What specific behaviors or phrases did you notice?
3. How did the facilitator transition to new topics on the agenda? Were these "smooth" or "rough" transitions?
4. What was the general atmosphere: relaxed, tense, etc? What behaviors or phrases may have contributed to this atmosphere?
5. How were the decisions made?
6. Did everyone participate? Were there certain procedures that encouraged participation from everyone?
7. How well did the group members listen to one another? How did the group interact with the facilitator?
8. Based on your answers to the above questions, what are things you can do to improve the way you facilitate your mentoring meetings? Meetings with others (e.g., team, branch, division)?

As a mentee, it is useful for you to keep a record of the meetings your mentor, given how easy it is to forget to what was discussed and agreed to during meetings. Consider using the template below to help keep track of those discussions.

Meeting Journal	
Name	Date
Main topics covered today	
My movement towards goal achievement	
What is going well?	
What is a problem, and why is it a problem?	
Things that I can do, or ask my mentor's advice, to deal with the problem	
Attitudes that need to be changed to deal with the problem	
What was agreed to be done before the next session?	
Date of next session:	
Topic or agenda for next session	
New insights in today's session	

*additional copies are located in Appendix D

TRUST AND RELATIONSHIP BUILDING

Everyone enters mentoring relationships with varying degrees of trust in their partners. Some people trust immediately and openly, some need for trust to be earned, and some fall in the middle of the spectrum. A mentoring relationship rooted in trust can be a powerful and transformational experience. A positive mentoring relationship forms when each party is willing to view their partners as reliable sources of information, knowledge, and support. This makes gaining your partners' trust, and giving them your trust in return, a critical component of any mentoring engagement. In a mentoring relationship, you have to trust your partner in order to effectively learn, take advice, and put that advice into action in your life. If you do not view your partner as a trustworthy source of information and advice, then little progress will be made in the relationship.

Building trust can take time, and your behaviors are critical in accelerating or stalling the time it takes. Review the list of trust-building behaviors below, and think about which behaviors may help you establish trust with your mentor/mentee.

Behaviors that Build Trust	Behaviors that Damage Trust
• Encourages • Helps others • Listens • Shares thoughts, opinions, and ideas • Speaks frankly and directly • Consistent • Cooperates • Acts an equal • Accentuates the positive • Acts calmly under stress • Offers empathy • Caring and friendly • Accepts and tolerates • Transparent and open • Open to new ideas and information • Verbal-nonverbal congruency • Resolves conflicts • Empowers and builds people up • Treats people as individuals	• Discourages and puts people down • Remains aloof or uninvolved • Hides thoughts and feelings • Indirect, vague, or devious in conversation • Erratic or unpredictable • Acts superior • Emphasize deficiencies and negatives • Explodes and overreacts • Manipulative • Acts indifferent or cold • Standoffish and uninvolved • Criticizes and judges • Underhanded and sneaky • Close-minded and opinionated • Actions differ from words • Threatens, punishes, and acts vindictive • Cuts others down, insults, and ridicules

Discussion

1. Have you ever worked with someone you really trusted? What allowed that trust to build?
2. Have you ever worked with someone you did not trust? What led to this distrust?
3. When your trust has been broken, how have you rebuilt it?
4. What are some behaviors you believe you exhibit that may damage the trust in your mentoring relationship?
5. How might you be more aware of these behaviors to avoid that damage?

ACTIVE LISTENING

Listening is one of the most important skills you can have. How well you listen has a major impact on your job effectiveness, and on the quality of your relationships with others. The way to become a better listener is to practice "active listening". This is where you make a conscious effort to hear not only the words that another person is saying but, more importantly, try to understand the complete message being sent.
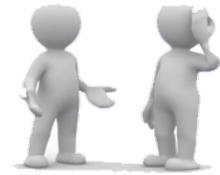
THE LISTENING PROCESS

Listening is more than just hearing! The figure shows that listening is really a 5-stage process.

- **Hearing:** Literally the act of information travelling on neural pathways to the brain.
- **Attending:** Filtering out some messages and focusing on others, which is a psychological choice. Some sounds are brought to the foreground while others stay in the background.
- **Understanding:** Making sense of a message by assigning meaning to it, often evaluating its importance. It is possible to hear and attend to a message without understanding. *Can you think of a time when this happened?*
- **Responding:** Providing both verbal and non-verbal feedback to the speaker to demonstrate listening.
- **Remembering:** Recalling information from memory. People may forget as much as half of what they hear immediately upon hearing it, but general impressions of people and situations are more easily retained, especially if feelings are present. *Remembering is important in building relationships, can you think why?*

NONVERBAL COMMUNICATION

Research shows that 70-93% of communication is non-verbal. Each of the following types of non-verbal communication should be monitored when interacting with others:
- Posture: Can indicate tension, relaxation, or interest
- Body Orientation: Can face toward or away from someone with head, feet, and body
- Gestures: Can convey certain messages or emphasize points
- Facial Expressions: Can change quickly and show a variety of emotions
- Eye Contact: Can convey interest, attitude, dominance, or excitement
- Voice Tone: Can vary in tone, pitch, volume, and rate to get across different meanings and emotions

LISTENING ACTIVITY I

Work with your mentor/mentee to practice active listening. Review all of the instructions before beginning.

1. Talk to each other for a few minutes to find a topic where you have differing views or personal tastes (such as current events, pop culture, etc.). An example may be using a Mac versus PC.
2. Choose one person to be the speaker (person A) and one to be the listener (person B).
3. The speaker will take one minute to explain his/her position and the reason why he/she holds that position. The job of the listener is to listen carefully during this time.
4. Once the speaker is finished, the listener will spend 30 seconds paraphrasing the speaker's position using phrases such as "It sounds like…" or "What I'm hearing you say is…". The listener should conclude the paraphrasing with an inquiry, "Am I hearing you correctly?" or "Do I have that right?"

> **NOTE:** *The goal is to understand the other person's point of view, not make judgments about the speaker's statements.*

5. The speaker will have two minutes to provide feedback to the listener to indicate whether he/she paraphrased the statements well and whether the speaker felt understood. If not, the listener may try again with some new rephrasing.
6. Switch roles and repeat Steps 1-5 with the listener (person B) as the speaker and speaker (person A) as the listener.

Discussion Questions I
1. As the listener, how accurate was your understanding of the speaker's statements?
2. How did your understanding of the speaker's position change after using paraphrasing?
3. What, if anything, changed your view of the issue after listening to the speaker?
4. What emotions did you feel by the end of the conversation? How did this compare to the other conversations you've had regarding differences of opinion?
5. How might this process benefit your mentoring relationship?

LISTENING ACTIVITY II

- One of you should try talking for one minute on any subject (e.g., your favorite music, sports team, restaurant).
- As the person speaks, the other person should try to look uninterested (e.g., looking away, sending e-mails).
- Repeat the exercise – this time the uninterested person should try to be really interested and to listen properly.
- Swap roles and repeat the exercise.

Discussion Questions II
1. How did it feel to listen actively to your partner?
2. How did it feel when you were being really listened to?
3. How did it feel when you weren't being listened to? Was it harder to talk?
4. Think of someone you know who doesn't seem to listen to you. What does this person do to let you know he/she isn't listening? How do you feel when talking to this person?
5. Think of a person who listens to you well. What do they do? How do you feel when talking to this person?
6. How might this knowledge benefit your mentoring relationship?

EFFECTIVE FEEDBACK

During the mentoring relationship, both mentors and mentees will need to learn to give and receive feedback from one another. Generally, it is the mentor who will provide feedback to the mentee and the mentee who will receive the feedback.

As a Mentor, the way you deliver feedback is as important as the message itself. In fact, the method of delivery has a tremendous impact on the mentee's ability to process and utilize the information. This feedback will be a critical component of your relationship. It is crucial that you help your mentee identify and learn the knowledge and skills needed for a successful career. This feedback will allow you to provide guidance to your mentee, acknowledge your mentee's strengths, and motivate the mentee to work on areas of weakness. Your feedback should always come from the desire to be helpful to the mentee.

Think about a time when you received feedback that you thought was helpful and valuable. What made this feedback helpful and valuable?

Types of Feedback
- Reinforcing Feedback
  - Increases the likelihood of repetition
  - Encourages the individual's strengths by acknowledging contributions and accomplishments
  - Builds confidence
- Redirecting Feedback
  - Serves to change upon performance
  - Provides the individual with awareness of areas needing improvement

Characteristics of Effective Feedback
- **Specific**—offering examples
- **Timely**—as soon as possible after the event/activity; time and place is appropriate
- **Sincere**—has positive intent
- **Meaningful**—aligned with values, goals, and priorities
- Focused on **actions and behaviors**, not the person
- **Avoids** loaded terms that produce emotional responses and raise defenses

Common Feedback Mistakes
- Judges the individual, not actions
- Too vague or general
- Speaks for others
- Negative sandwiched between positive
- Making assumptions about the motives

SITUATION–BEHAVIOR–IMPACT FEEDBACK MODEL

One common model to provide feedback that shouldn't "ruffle feathers" is the Situation–Behavior–Impact Model. This model provides a framework to organize your feedback to help provide the individual with feedback that is specific and useful.

S – Situation or task
B – Behaviors
I – Impact
R – Request

SBI+R Feedback Organizer

Step	Focus	Pointers	Your Feedback
1. Situation	State the issue or problem	• What are the facts of the situation? • Who, What, Where, When • Make assertions using facts and avoid giving assessments (opinions)	
2. Behaviors	Provide specific behaviors	• What was the person's behavior? • Describe the behavior – factually, not interpretively	
3. Impact	Describe the impact the behavior had on the individual, the rest of the team, the project, others	• Relay the impact the behavior had on you and others • Keep it clear and concise • Claim this as *your* truth vs. "the truth" • Focus on impact *not* intent	
Create a Pause Make sure you give the other person a chance to offer his/her input Feedback should be a conversation			
4. Request	What would you like the person to do differently?	• What is the *request* you have for the future? • What behavior do you want to continue? • What behavior do you want to stop?	

As a Mentee, how you receive feedback is also critical. It is difficult and often uncomfortable to provide feedback. How you receive that feedback will impact how comfortable your mentor is giving you feedback in the future. Remember these tips throughout your relationship: Ask for feedback only when you want an honest response

- Listen carefully – Do not interrupt the speaker
- Keep emotions in check – Avoid becoming defensive; stay focused on the positive
- Ask questions for clarity – Ask for examples or specific observations if you do not hear any
- Take time to think about what you learned
- Follow through on commitments made during the conversation and update the person on progress

FEEDBACK ACTIVITY

1. Select one person to **give** feedback. Use scenarios 1-4 below to give feedback to your mentee/mentor as if he/she were the person in the scenario.
2. As the person **receiving** feedback, respond appropriately – Be a good learning partner!

   Situation 1: Your colleague misrepresented your perspectives during a meeting that you were not able to make.
   Situation 2: You need a response to a question to finalize your report. You have e-mailed the Subject Matter Expert (SME) three times and left 2 voice mail messages, but still have not heard back. This is not the first time this has happened.
   Situation 3: Your employee/peer has wrapped up a project and did a great job.
   Situation 4: A member of your team often leaves his/her printed copies of documents on the printer and leaves sensitive information on the computer without logging off when he/she goes to lunch. You are very concerned about sensitive information being left unprotected.

   Situation 5: This person has missed 3 out 4 conference calls after confirming that he/she was planning to attend.
   Situation 6: This person cuts you off in meetings whenever you start to speak.
   Situation 7: You feel like this person is completely disorganized.
   Situation 8: This person just presented findings from a report, and you think it went well.

3. Switch roles so that the person who received the feedback is now giving the feedback, using scenarios 5-8.

Discussion Questions
1. What is the one thing that the "feedback giver" did well?
2. What one suggestion do you have for improvement?
3. What one piece of feedback do you have on the use of the SBI+R model?

Facilitation Phase:
Individual/Skill Development

COACHING SKILLS FOR MENTORS

Coaching is a different approach to problem solving and is meant to empower the mentee. It is useful for developing the problem solving and reasoning abilities of mentees. If the mentee wishes to know something they will usually approach you expecting you to provide an answer. However, coaching provides an insight into the depth of the mentee's knowledge and reasoning, which is not provided by responding to questions with straight answers.

> *Coaching and mentoring are about helping people see something differently so that they can take new action and get better results.*

Something to Think About

- Identify a current issue or challenge you are facing
- Ask yourself:
  - Observer – How do I see it?
  - Action – What actions am I taking or have I taken?
  - Results – What results am I getting (e.g., where am I stuck)?
- How do you shift your perspective?

  And… how do you help your mentee shift his/her perspective?
  > *You will need to use 3 skill sets to coach effectively: active listening, direct communication, and **asking powerful questions**.*

How does the person currently see it?

What else is possible? What result does he/she want?

Fact-based Questions	Open-ended Questions
Action	Brainstorming

What actions will the person take? What learning occurred?

What has not been considered?
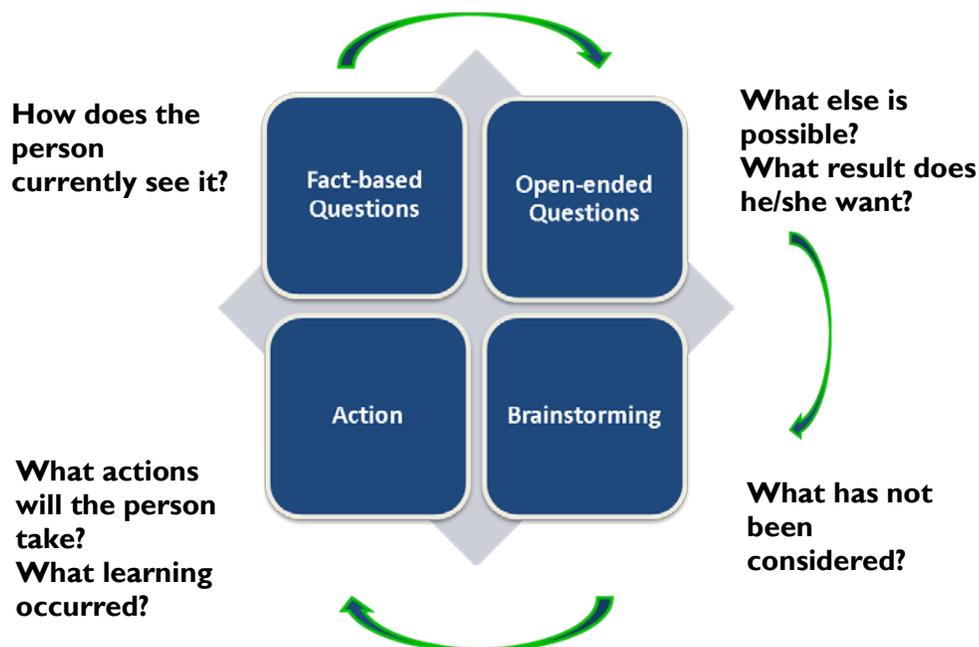
What does this process look like?
Ask **Fact-based and Open-ended** Questions

- What is your main concern?
- What matters most to you about this?
- What have you tried? What have you not tried?

- What is the ideal outcome?
- What would success look like?
- What step could you take to resolve this?

Now, **offer** your partner your perspective or ideas…based on what you have heard throughout the conversation.

Take a moment to **Mentor:**
- What has been your past experience?
- What do you know that they may not know?
- What resources/connections can you offer?

Brainstorm different possibilities together.

Conclude with a *committed action*
- The next action the person will take or
- A practice they might try

Next time someone presents you with a problem, stop and *ask* vs. fix….

Coaching Tips
- Help the mentee identify his/her needs and goals.
- Be aware of the mentee's learning style, but help him/her work outside the confines of his/her chosen learning style.
- Keep the mentee focused on the task and process.
- Encourage participation but remember that individuals participate in different ways. Some may talk very little, but they are still participating. Others may wish to talk constantly and may be contributing little.
- Share opinions, but do so in ways that do not demand nor impose.
- Do not do the work for the mentee. Learning is more effective and lasting if the individual discovers on their own (learns by doing).
- Spend time ensuring that the mentee grasps the tasks and concepts.
- Recognize and accept your own limitations; do not feel you must be an expert.
- Listen more than talk.
- Ask if there are questions, frequently, and allow time for the mentee to think before answering.
- Encourage critical thinking.
- Remain as objective as possible.
- Be alert to signs of confusion and review tasks which are causing confusion.

NETWORKING

The word "network" refers to the complex set of relationships you maintain – personally and professionally. This network is the means by which you get information, build support, and influence decision making.

There are 3 types of networks:
- Information networks: People you know who can get information for you.
- Influence networks: People you know who can get things done.
- Support networks: People you know who can offer support.

Work with your mentor/mentee to discuss how you might improve your information, influence, and support networks to reach your personal and professional goals.

BUILDING INFORMATION NETWORKS

Information networks allow you to gather information needed to perform your job effectively, to grow, and to develop. These types of networks involve knowledge sharing, communication and information flow, and relationship building. Think about the following:
- ☐ Where is the important information I need to be successful in my career and/or to achieve my goals?
- ☐ How can I design and develop a network to access this information?
- ☐ How can I develop a network that will help me understand the interests of involved groups and estimate their relative power?
- ☐ How can I use my network to monitor attitudes and reactions as the program proceeds?

Discussion Questions
1. Who is in your information network?
2. How can you improve your information network?

BUILDING INFLUENCE NETWORKS

Influence networks enable you to achieve objectives by aligning yourself with people in the system who influence others. In this respect, you don't need to have direct links with those who make the decisions – just that you have positive and strong relationships with those who can influence the decision making. Consider the following:
- ☐ Who are the key people who have influence in your division/directorate (or in areas that will help you achieve your goals)?
- ☐ How can I influence key external stakeholders to promote and support me?
- ☐ How can I get them to help me, counteract potential conflict, or overcome their indifference/resistance?
- ☐ If I cannot influence them directly, who do I know who can?

Discussion Questions
1. Who are the decision-makers in your organization (e.g., division, directorate/office)?
2. Who is in your influence network?
3. How can you improve your influence network to have a positive impact on the decisions made?

BUILDING SUPPORT NETWORKS

Support networks consist of friends, mentors, and colleagues who provide psychological support and emotional balance. They include people who understand the complexities of the organization and who can be depended on for an objective perspective. Ask yourself the following:

- ☐ Who at NSF is prepared to support me?
- ☐ Do I have objective and informed listeners to keep me and my reactions in perspective?
- ☐ Who can provide me with emotional support when things get tough?

Discussion Questions
1. Who is in your support network, and how adequate is it?
2. When do you use it?
3. How could you improve it?

TOTAL NETWORK ANALYSIS

Review your answers to the exercises above, and consider them in the light of the following questions.
1. What are the strengths of your networks?
2. What weakness in your networks have you become aware of through this analysis?
3. What elements of your network do you need to develop to be more effective?
4. What skills do you need to develop to be able to network more effectively?
5. What steps can you take to develop these skills?

NETWORKING AND CAREER GROWTH

Thinking of your goals, discuss the following questions.
1. What job should you aim for next?
2. What skills do you need to master to obtain that job?
3. With whom do you need to build relationships to develop your career?
4. What can you do in your current job that moves you towards your current goal?

MANAGING UP

The "Art of Managing Up" by Wayne Turk (see pages 32-34) describes how to develop an effective relationship with your supervisor. The article presents strategies to not only improve the flow of communication between you and your supervisor, but strategies to also expand your level of understanding about him/her and tailor your behaviors accordingly. As an employee looking to enhance your development, the skills presented here may be highly beneficial in improving your performance, career, and professional relationships. After reading this, you will see that managing up is an important skill for every employee and it involves simply realizing you have the ability to make things better.

Discussion Questions
Below are a few questions to facilitate your discussion(s) about managing up and how you can apply the strategies discussed.

1. What is the importance of managing up in your organization?
2. How do you think these practices could help you in achieving your immediate goals, as well as the goals of the division and NSF?
   a. How might they help you in achieving your long-term goals?
3. What about managing up may be difficult (or a challenge) for you?
4. What are things you can do to overcome these challenges? List specific actions.
5. What is the difference between managing up and managing down?
   a. Is either more important or critical at this stage of your career?

POLITICAL SAVVY

The article presents strategies to not only improve the flow of communication between you and your supervisor, but strategies to also expand your level of understanding about him/her and tailor your behaviors accordingly. As an employee looking to enhance your development, the skills presented here may be highly beneficial in improving your performance, career, and professional relationships. After reading this, you will see that managing up is an important skill for every employee and it involves simply realizing you have the ability to make things better.

Insights on How to Be More Politically Adept

- Master influencing others (e.g., learn how to position ideas effectively, time the delivery of those ideas, and select the right communication channel)
- Make yourself and your ideas memorable
- Accurately "read between the lines"
- Identify and understand both your own political style and that of those around you
- Think like a chess player – strategically and about the "end game"
- Identify possible objections and address them before they become hardened positions
- Manage reciprocity
- Give credits even when it's not due

Discussion Questions

Below are a few questions to facilitate your discussion(s) about using political savvy behaviors and how you can apply the strategies discussed.

1. What words come to mind when you hear the term "political savvy?"
2. What does it mean to be politically savvy?
3. What do you believe are effective political savvy behaviors?
4. Rate yourself (1-10) on your political "savvy-ness." Why that rating?
5. What can you do to develop political acumen?

SELF-ASSESSMENTS

Self-assessments encourage you to identify and explore your values, personality, interests, and skills. The results provide you with a starting point to use in the process of strengthening your areas of weaknesses, leveraging your strengths, and recognizing how you might be perceived by others. Consider completing the self-assessments below and discussing the results with your mentor/mentee.

MY PERSONAL SNAPSHOT

You and your mentee/mentor should complete your own snapshot. Afterwards, consider discussing your responses with each other.

> *Remember*: Answer these questions as honestly as you can. If you're not honest, you'll end up with a picture of someone else, not yourself, and that won't help you become who you want to be!

1. What are my top 5 strengths as a person —the top 5 things about myself I feel good about and am proud of?

2. What are my top 5 weaknesses as a person —the 5 things I most want to work on or improve about myself?

3. What are the top 5 opportunities available to me at this moment – things I could do or act on or take advantage of that would help me develop and reach my potential? (These are opportunities outside yourself.)

4. What are the top 5 obstacles I'm facing right now – things that could keep me from achieving my dreams?

5. What are the 5 most important things I can do over the next 6 months to build on my strengths and overcome my challenges?

Here is an opportunity to assess yourself on six factors to evaluate your mentoring partnership: purpose, communication, trust, process, progress, and feedback. Take a few minutes and try to rate yourself as you actually are, not as you'd like to be. Consider sharing the results with one of your own mentors. You may or may not wish to share the results with your mentee; that's up to you.

Your mentee should complete a similar self-assessment later in this workbook. We encourage the two of you to use this assessment as a tool for talking about the nature and quality of your relationship and how it could be even better.

Directions: For each item, rate yourself as follows:
    1=Strongly Disagree   2=Disagree   3=Agree   4=Strongly Agree

Purpose
____ This mentoring relationship is a high priority for me.
____ Being a responsible mentor is one of the most important steps I can take in this relationship.
____ I've asked my mentee to clarify why he/she wants to meet with me.
____ I've asked my mentee to propose one or more goals to work on in this relationship.
____ My mentee and I are clear on how we'll recognize when he/she's reached his/her goal(s).
____ I feel good about the focus of this relationship and what I'm doing in it.
____ This relationship is a good use of my time.
____ From time to time, I check in to see if we should change our focus in some way.
____ Once my mentee has accomplished his/her goal(s), I'm willing to see the relationship shift focus or perhaps end for the time being.
    Total points for Purpose: _____

Communication
____ I communicate with my mentee in the ways (in person, phone, e-mail, mail) we agreed.
____ I get back to my mentee within the timeframe we agreed.
____ The communication between us adds up to at least two hours a month.
____ Occasionally, I spontaneously contact my mentee just to say hello or pass on some information.
____ I'm an effective listener and remember what my mentee tells me.
____ I ask appropriate questions.
____ I share appropriate information about myself.
____ I monitor my nonverbal language to be sure it's conveying what I want it to.
____ I give my mentee suggestions for how he/she can communicate better.
____ I work on being a better communicator.
    Total points for Communication: _____

Trust
____ I've talked about the topics of trust and confidentiality with my mentee.
____ I'm beginning to trust my mentee more and more.
____ I'm becoming less guarded than when we first got together.
____ I share important information about me with my mentee.
____ My mentee seems to be trusting me more and more.
____ I welcome and keep in the information he/she shares with me confidence.
____ My mentee can count on me to be honest.
____ He/She can count on me to follow through on my promises.
____ I avoid any trust-breaking behaviors such as canceling appointments without compelling reasons, talking negatively about others, or making excuses about why I don't follow through.

____ I'm willing to forgive some mistakes my mentee makes because my trust in him/her is strong.
    Total points for Trust: _____

Process
____ I ask my mentee to take responsibility for scheduling our meetings.
____ I like all or most of our meeting locations.
____ I've checked to be sure my mentee likes our meeting locations.
____ I like the length of our meetings.
____ I've checked to be sure my mentee likes the length of our meetings.
____ I'm satisfied with the way we conduct our meetings.
____ I've checked to be sure my mentee is satisfied with how we conduct our meetings.
____ I'm aware of the stages of formal mentoring.
____ I'm helping us move through these stages.
____ I've checked to see if my mentee likes the style and frequency of our communications.
    Total points for Process: _____

Progress
____ My mentee has one or more specific goal(s) to work on with my help.
____ I make it easy for my mentee to ask for help.
____ I ask my mentee to take the lead on identifying interesting learning experiences to try.
____ I sometimes suggest learning experiences for my mentee.
____ I ask my mentee to do at least one learning activity in between our mentoring meetings.
____ I ask for the results of his/her learning and discuss it with him/her.
____ Since starting to meet with me, my mentee has made significant progress toward his/her goal(s).
____ I'm making notable progress in my ability to mentor.
____ I'm helping my mentee learn more about being an effective mentee.
____ I help my mentee celebrate his or her/our progress.
    Total points for Progress: _____

Feedback
____ I asked my mentee how and how often he/she wants positive feedback.
____ I provide enough positive feedback to my mentee.
____ I asked my mentee how he/she wants corrective feedback.
____ I give my mentee positive feedback about his/her actions and personal qualities.
____ I give my mentee enough corrective feedback.
____ I graciously receive positive feedback from my mentee.
____ I encourage my mentee to show appreciation to me and other helpers.
____ I asked my mentee to give me corrective feedback about my mentoring efforts.
____ When I receive corrective feedback from my mentee, I'm usually non-defensive.
____ When I receive corrective feedback from my mentee, I take immediate steps to apply it.
    Total points for Feedback: _____

TOTAL POINTS FOR ALL SIX FACTORS: _____
Scoring: Add up your points for each factor, and then total all your points.

160-239 points: You seem to be a committed, effective mentor. Check this out with other mentors you admire and/or with your mentee to be sure your assessment is accurate. Continue to enjoy mentoring and continue to polish your skills.

80-159 points: You're doing many things right as a mentor. Talk with someone even more experienced in formal mentoring to see if your assessment is accurate and if he/she has suggestions for improvement. Try to add or improve your performance on any items that you rated low.

79 or fewer points: It's admirable that you took this assessment and want to improve as a mentor. You may be harder on yourself than you need to be. Talk with your own mentor or someone more knowledgeable about formal mentoring to see if he/she will give you honest feedback on what you're doing right and what you could improve. Try to add a few new effective behaviors over the coming months.

Here is an opportunity to assess yourself on six factors to evaluate your mentoring partnership: Purpose, Communication, Trust, Process, Progress, and Feedback. Take a few minutes and try to rate yourself as you actually are, not as you'd like to be. Consider sharing the results with your mentor.

Your mentor should complete a similar self-assessment later in this workbook. We encourage the two of you to use this assessment as a tool for talking about the nature and quality of your relationship and how it could be even better.

Directions: For each item, rate yourself as follows:
1=Strongly Disagree   2=Disagree   3=Agree   4=Strongly Agree

Purpose
____ This mentoring relationship is a high priority for me.
____ Finding my mentor was an important step for me.
____ Being a responsible mentee is key to the success of this partnership.
____ I've been clear with my mentor on why I want to meet with him/her.
____ I've proposed one or more goals to work on with the help of my mentor.
____ I'll recognize when I've reached my goal(s).
____ I feel good about the focus of this relationship and what I'm doing in it.
____ This relationship is a good use of my time.
____ From time to time I check in to see if we should change our focus in some way.
____ Once I've accomplished my goal(s), I'm willing to see the relationship refocus or perhaps end for the time being.
       Total points for Purpose: _____

Communication
____ I communicate in the ways we agreed.
____ I get back to my mentor in the timeframe we agreed.
____ The communication between us adds up to at least two hours a month.
____ I don't communicate more often than we agreed unless it's a special circumstance.
____ I'm an effective listener and remember what my mentor tells me.
____ I ask appropriate questions.
____ I share adequate information about myself.
____ I monitor my nonverbal language to be sure it's conveying what I want it to.
____ I invite my mentor to give me suggestions for how I can communicate better.
____ As soon as possible, I try out my mentor's suggestions on communication.
       Total points for Communication: _____

Trust
____ I've talked about the topics of trust and confidentiality with my mentor.
____ I'm beginning to trust my mentor more and more.
____ I'm becoming less guarded than when we first got together.
____ I share important information about myself with my mentor.
____ My mentor seems to be trusting me more and more.
____ I welcome and keep in confidence the information he/she shares with me.
____ My mentor can count on me to be honest.
____ He/She can count on me to follow through on my promises.
____ I avoid any trust-breaking behaviors such as canceling appointments without compelling reasons, talking negatively about others, or making excuses about why I don't follow through.

_____ I'm willing to forgive some mistakes my mentor makes because my trust in him/her is strong.
  Total points for Trust: _____

Process
_____ I take responsibility for scheduling our meetings.
_____ I like all or most of our meeting locations.
_____ I've checked to be sure my mentor likes our meeting locations.
_____ I like the length of our meetings.
_____ I've checked to be sure my mentor likes the length of our meetings.
_____ I'm satisfied with the way we conduct our meetings.
_____ I've checked to be sure my mentor is satisfied with how we conduct our meetings.
_____ I'm aware of the stages of formal mentoring.
_____ I'm helping us move through those stages.
_____ I've checked to see if my mentor likes the style and frequency of our communication.
  Total points for Process: _____

Progress
_____ I'm working on one or more measurable goals with the help of my mentor.
_____ I make it easy for my mentor to help me develop.
_____ I take the lead on identifying interesting learning experiences I can try.
_____ I welcome my mentor's suggestions of learning experiences for me.
_____ I do at least one learning activity in between our mentoring meetings even if that takes me 2-4 hours
_____ I report the results of my learning to my mentor.
_____ I've made significant progress toward my goal(s) since starting to meet with my mentor.
_____ I'm making notable progress in my ability to be mentored.
_____ My mentor knows and is satisfied with my progress.
_____ I/We celebrate my progress.
  Total points for Progress: _____

Feedback
_____ I told my mentor how and how often I want positive feedback.
_____ I receive the right amount of positive feedback from my mentor.
_____ I told my mentor the way I'd like to receive corrective feedback.
_____ I continue to ask my mentor for corrective feedback.
_____ When I receive positive feedback, I express my thanks.
_____ When I receive positive feedback, I use the information to reinforce my habits.
_____ When I receive corrective feedback, I'm usually non-defensive.
_____ When I receive corrective feedback, I take immediate steps to apply it.
_____ I remember to give my mentor positive feedback about his/her mentoring and other assistance.
_____ (If agreed upon) I give my mentor suggestions for improvement.
  Total points for Feedback: _____

TOTAL POINTS FOR ALL SIX FACTORS: _____
Scoring: Add up your points for each factor, and then total all your points.

161-240 points: You seem to be a committed, effective mentee. Check this out with your mentor to be sure your assessment is accurate in his/her eyes.

81-160 points: You're doing many things right as a mentee. Talk with your mentor to see if your assessment is accurate and if he/she has suggestions for improvement. Try to supplement or otherwise improve your performance on any items that you rated low.

80 or fewer points: It's admirable that you took this assessment and want to improve as a mentee. You may be harder on yourself than you need to be. Talk with your mentor to see if he/she will give you honest feedback on what you're doing right and what you could improve. Try to add a few new effective behaviors over the coming months.

PERIODIC MENTORING RELATIONSHIP REVIEW

Over time the nature of the mentoring relationship may change and/or the support needed could change. Therefore, it is valuable for a mentor and mentee to review the relationship throughout the year and make any adjustments as necessary to the way they work together and the type of support provided.

As you sit down together, consider discussing the following questions:

☐ How is the mentoring partnership working?
☐ What is working well?
☐ What are the benefits of the relationship up to this point? How is your mentor helping you achieve your goals?
☐ What, if anything, is working not as well as you had hoped?
☐ What are you both gaining from your experience in the process?
☐ What changes do you see in yourself and the way you approach your work as a result of the mentoring relationship?
☐ What kinds of adjustments or changes, if any, are needed in your goals or in the relationship?
☐ What additional support do either of you need?
☐ What external constraints or difficulties are affecting the partnership? How might these be resolved?
☐ What changes might be helpful to make in the way the program or either party operates within its expectations?

COMMON CHALLENGES YOU MIGHT ENCOUNTER

It is common for mentoring relationships to experience challenges during the year. Here are some examples of challenges other mentors and mentees have faced.

- **Time and Energy** – Despite good intentions, other priorities may interfere with you finding sufficient time to do all you want to do in the relationship. As a result, the momentum in the relationship tends to decrease.

- **Building Trust** – With only a few of hours of contact each month, it may not be easy to build the kind of trust you both would like.

- **Sensitivity to Differences** – Some people struggle with showing respect for differences in styles, approaches, opinion, and personal characteristics. Often this creates a tense atmosphere, may impact trust, and limit the mentee's learning and development.

- **Crossing Boundaries** – Both personal and professional boundaries tend to be sensitive. Crossing boundaries can create negative tension in the relationship.

- **Breaching Confidentiality** – A breach of confidentiality can irrevocably damage the mentoring relationship by causing significant damage to the trust established in the relationship, at a minimum.

- **Discovering Mismatch between Mentor and Mentee** – A mismatch between a mentor and mentee may result from conflicting personalities, differing career goals, areas of expertise, differences in work ethic, or any number of other reasons.

 Discuss how you and your mentor/mentee might address these issues.

REFLECTION PHASE:
LESSONS LEARNED

Prior to bringing your relationship to a close, you and your mentor/mentee should work together to reflect back on your relationship, explore the types of support you may need in the future, and discuss whether the relationship will continue informally. *Note: As a participant in NSF's Formal Mentorship Program, you will also be guided through these activities at the end of each year.*

Reflection Checklist

- □ What have you accomplished this year? Did you meet the goal(s) you set?
- □ Do you need to revise those goals?
- □ What might next year's goals be?
- □ What did you learn about yourself this year?
- □ What did you learn about your division/directorate/NSF that you didn't know before?
- □ Has your (written, oral, interpersonal) communication improved this year? If so, how?
- □ How have you developed as an individual?
- □ Have your professional networks expanded?
- □ What has been the most satisfying aspect of your mentoring relationship?
- □ What have you learned about being an effective mentor/mentee that you can apply in your next mentoring relationship?
- □ How will you use your remaining time together?

REDEFINITION PHASE:
NEXT STEPS

ENDING THE MENTORING RELATIONSHIP YEAR

Whether you choose to continue the relationship informally or end the relationship, you should celebrate what you've achieved over the year.

You have several options at the end of the year:
- Continue your relationship informally
- Wrap up your relationship
- Find a new person to work with during the next year

Be sure to discuss your preference with your mentor/mentee. Be honest, candid, and supportive regardless of your reasons.

As a member of the Formal Mentoring Program, you will attend a formal celebration with all participants. However, the individual successes, personal knowledge gained, and friendship developed as a result of your individual relationship should also be celebrated one-on-one.

Suggested ways to celebrate and recognize your accomplishments include:
- Taking the time to say, "*Thank You*", to each other
- Writing a "Thank You" note to your mentor/mentee
- Writing a testimonial
- E-mailing your mentor/mentee's supervisor to convey your accomplishments
- Getting together for a meal or drink

GENERAL TIPS

TOP 10 TIPS FOR MENTORS

1. **Take the time to build the relationship with your mentee.** Trust and respect are the foundation on which mentoring relationships are built. Provide information about yourself, your organization, your program facilitation experience and other information that you think would help your mentee get to know you. Allow some time for casual conversation before and/or after each learning opportunity.

2. **Maintain regular contact.** Consistent contact models dependability and builds trust.

3. **Listen closely and ask questions.** Active listening requires suspending judgment, listening for understanding, and providing an accepting and supportive atmosphere. Questions should be open-ended, probing, and challenging.

4. **Don't expect to have all the answers.** You are a resource with knowledge and experience to share, but you are not solely responsible for your mentee's knowledge and skill acquisition. Help your mentee access resources, expand support networks, and understand the importance of maintaining positive relationships with colleagues.

5. **Allow for freedom of expression.** Your mentee may have his/her own problem-solving, learning, and communication styles. Your role is to help increase the ability of your mentee to use other styles, while respecting his/her methodology. You should, however, feel comfortable contributing ideas or suggestions based on your experiences and observations. Keep in mind that feedback is a gift; the recipient chooses what to do with it.

6. **Be clear about your expectations and your boundaries.** Set up ground rules and communicate them.

7. **Respect confidentially.** Maintain and respect privacy.

8. **Be prepared.** Think about the things that you have learned through training or experience that would be helpful for your mentee to know.

9. **Experiment with the feedback process.** Be attentive of the process and work toward using feedback methods that work for both you and your mentee. Consider coaching, role plays, brainstorming, and other techniques.

10. **Recognize and encourage excellence.** Be sure to acknowledge your mentee's achievements and provide the mentee with reinforcing/positive feedback throughout the year.

TOP 10 TIPS FOR MENTEES

As you prepare and progress on your journey as a mentee, consider the following 10 Tips to being an effective mentee and getting the most of the mentoring relationship.

1. **Be clear on what you want to gain from the mentoring relationship.** Before beginning with your mentor, take time to reflect on the key areas you want to focus during your mentoring relationship. Use the Mentoring Agreement to clarify what it is you are moving toward and how your mentor might help you.

2. **Have real and purposeful conversations.** Clear time to have "real" conversations rather than rushed check-ins with your mentor. Get to know your mentor on a personal as well as professional level and allow them to know you. Share your thinking and insights with your mentor, and ask him/her to do the same.

3. **Make clear requests of your mentor.** The mentor is there to share knowledge, professional experience, and resources or contacts they may have that will assist you. However, the mentor is not a mind-reader. Articulating what you need through clear requests of your mentor will make the relationship more productive and satisfying for you. Requests should be within the scope of the mentoring. Be clear in your requests, knowing that you won't get what you don't ask for; and, the mentor always has the option of saying "no."

4. **Take action toward your goals.** The mentoring relationship offers you the rare opportunity of having someone committed to helping you achieve your goals. Your mentor will help you think about ways to remove barriers and actions you can take. However, without trying some new actions, there may be little substance to the mentoring. Try new actions and assess what you learned.

5. **Take a step back to see things differently.** We often try different actions again and again with little if any difference in results. Ask your mentor to help you see your situation differently and/or from their perspective so that you may open up new and untried actions, which may lead to different results.

6. **Be curious.** Get curious with your mentor. Ask him or her about past experiences, their journey, etc. Suspend your judgment and just explore. The mentoring relationship is based on mutual respect, trust and freedom of expression. Ask them to share their stories of major points of growth and change along the way—what allowed them to reach the next level, to attain goals similar to the ones you are exploring?

7. **Acknowledge what you do well.** We are so often only given feedback when there is a problem; and, by nature, we tend to look at our own "gaps." Make sure you are also discovering and utilizing your strengths. Ask your mentor what he/she sees that you do/have done well that you might not be able to see. What can you do to use this strength even more—is there a way it can help compensate for a weakness? Focusing on what is working begets a higher level of performance and builds confidence.

8. **Take a look at your blindspots.** Just as we cannot always see what we do well, we often do not see our blindspots. A blindspot is what others see about us, but that we do not see (or acknowledge) in ourselves. Ask your mentor what blindspots they may see, particularly as it relates to the goals you are trying to achieve.

9. **Don't put your mentor on a pedestal.** Your mentor will likely be at a substantially higher "level" than you are. At the same time, this is just the role they hold, not who they are. Be careful not to put your mentor on a pedestal, as this can prevent you from relating to him/her as a partner.

10. **Have fun!** The mentoring experience will hopefully be one you look back on throughout your career. And, while there is serious work involved, don't forget to have fun; laugh with your mentor, be adventurous and don't take things so seriously as to get in your own way!

Suggested Resources

Books

The Mentor's Guide: Facilitating Effective Learning Relationships, by Lois J. Zachary (2000)
> Thoughtful and rich with advice, *The Mentor's Guide* explores the critical process of mentoring and presents practical tools for facilitating the experience from beginning to end. Now managers, teachers, and leaders from any career, professional, or educational setting can successfully navigate the learning journey by using the hands-on worksheets and exercises in this unique resource.

How: Why How We Do Anything Means Everything...in Business (and in Life), by Dov L. Seidman (2007)
> Discusses how the qualities that many once thought of as "soft"—trust, integrity, values, and reputation—are now the hard currency of business success and the ultimate drivers of efficiency, productivity, and profitability. It's no longer what you do that sets you apart from others, but how you do what you do. What are commodities, easily duplicated or reverse-engineered.

The 7 Habits of Highly Effective People, by Stephen Covey (1989)
> Covey realizes that true success encompasses a balance of personal and professional effectiveness, so this book is a manual for performing better in both arenas. Before you can adopt the seven habits, you'll need to accomplish what Covey calls a "paradigm shift"--a change in perception and interpretation of how the world works. Covey takes you through this change, which affects how you perceive and act regarding productivity, time management, positive thinking, developing your "proactive muscles" (acting with initiative rather than reacting), and much more.

On Becoming a Leader, by Warren Bennis (2009)
> Warren Bennis has persuasively argued for years that leaders are not born—they are made. Delving into the qualities that define leadership, the people who exemplify it, and the strategies that anyone can apply to achieve it, his classic work On Becoming a Leader has served as a source of essential insight for countless readers. In a world increasingly defined by turbulence and uncertainty, the call to leadership is more urgent than ever.

Deep Change: Discovering the Leader Within, by Robert E. Quinn (1996)
> Examines how people can create great change in large organizations by changing themselves. Discusses the need for personal change and challenges the reader to develop a vision that includes the creation of excellence. Includes questions to be used as springboards to personal and organizational change.

Highest Duty: My Search for What Really Matters, by Chelsey "Sully" Sullenberger and Jeffrey Zaslow(2009)
> By now just about everyone has seen the surreal footage of the US Airways plane that glided into the icy waters of the Hudson River in New York City last January in an emergency landing. We saw the passengers standing on the wings of the plane – knee deep in water – waiting to be pulled into the boats that immediately converged on the scene. It's hard not to imagine what it must've been like for the passengers on that plane. Harder still would be to imagine what it was like to be the man at the controls of that plane. Sullenberger, the pilot of US Airways flight 1549, details not only the events of that unforgettable day, but he also reveals the inner workings of his life: where he

comes from, his military background, and the important people, places, and events that have shaped him. Sully has a very strong work ethic and has always pushed himself to achieve excellence in every endeavor.

Lift: Becoming a Positive Force in Any Situation, by Ryan W. Quinn and Robert E. Quinn (2009)
Combines cutting-edge social science and real-world examples to describe four mindsets that increase your awareness of the unconscious ways you're holding yourself and others back. Offers practical guidelines and practices for exerting positive influence in any situation.

Talking from 9 to 5: Women and Men at Work, by Deborah Tannen (1995)
Probes the way gender roles shape the ways men and women communicate in the workplace, and how these differences lead to misunderstandings.

Blink: The Power of Thinking Without Thinking, by Malcolm Gladwell (2005)
Blink is about the first two seconds of looking--the decisive glance that knows in an instant. Gladwell campaigns for snap judgments and mind reading with a gift for translating research into splendid storytelling. Building his case with scenes from a marriage, heart attack triage, speed dating, choking on the golf course, selling cars, and military maneuvers, he persuades readers to think small and focus on the meaning of "thin slices" of behavior. The key is to rely on our "adaptive unconscious"--a 24/7 mental valet--that provides us with instant and sophisticated information to warn of danger, read a stranger, or react to a new idea.

Getting To Yes, Negotiating Agreement Without Giving In, by Roger Fisher, William Ury, and Bruce Patton (1991)
Getting to Yes is a straightforward, universally applicable method for negotiating disputes without getting taken and without getting angry. It offers a concise, step-by-step, proven strategy for coming to mutually acceptable agreements in every sort of conflict.

ARTICLES

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APPENDICES

Mentoring Agreement for Mentor/Mentee Pairs

This form is for individuals entering into a one-on-one mentoring partnership. Please discuss each item below. Through discussion, commit to personal development goals, activities, communications, time investment, challenge and confidentiality. Refer to this agreement at least quarterly and make adjustments as needed.

This agreement is between _____ **and** _____

DEVELOPMENT GOALS

Goals serve as a roadmap for a mentoring relationship. Both mentor and mentee should set goals that describe what they would like to have accomplished within certain timeframes. For help setting goals, see our SMART Goals worksheet.

Mentee goals	Mentor goals

MENTORSHIP ACTIVITIES

There are many activities that are appropriate in the context of mentorship. The activities that <u>mentors</u> typically engage in include coaching through specific problems, role modeling certain skills or approaches, providing direct instruction, advocating for opportunities, supporting through challenges, and career counseling. Mentee activities include identifying and introducing topics for discussion, bringing challenges and problems to the table, asking for advice, developing action plans in response to feedback, and providing upward feedback. In the space below, indicate activities that you intend to invest in.

Mentee activities	Mentor activities

COMMUNICATIONS & TIME INVESTMENT

One of the most critical factors in mentoring is the frequency and quality of communications. The best thing you can do to ensure an effective mentoring relationship is to set a realistic plan for formal and informal communications, then follow through with that plan.

We will meet in person:

The person responsible for scheduling/rescheduling meetings is:

The person responsible for setting a meeting agenda is:

[   ]

Is it acceptable to email, call, and/or drop by with questions?

[   ]

CHALLENGE & FEEDBACK

In a healthy mentorship, all parties are able to give and receive constructive feedback. In the space below, indicate one or more topics on which you are willing to receive feedback, and any topics that are off limits for feedback.

Mentee	*Mentor*
I am open to receiving feedback on:	*I am open to receiving feedback on:*

CONFIDENTIALITY

We will not share….

[   ]

We'll ask permission before sharing…

[   ]

It's okay to share…

[   ]

SAFETY NETS

We will reflect on the effectiveness of this arrangement and make adjustments as necessary no later than [date]:

[   ]

If either party observes warning signs of mentorship dysfunction, he or she will:

[   ]

SIGNATURES

_____   _____
Mentee   *Mentor*

<mark>Update required training section and see if I can lines to the sections OR point them to the SharePoint form</mark>

Individual Development Plan

Name	Current Position	Grade/Step
Directorate/Office	Division	Branch

Overview

The NSF IDP is designed to guide you through the process of identifying specific actions you can take to excel in your *current* position. Concise instructions for completing this IDP are provided by section. Refer to the IDP Completion Guide for details, examples, and exercises that will help you complete each section.

Part I: Required Training

Instructions: Check the activities that you plan to complete to meet training requirements aligned to your current position.

Required for	Topic	Activity
All employees, annually	No FEAR Act	☐ No FEAR Act Training
All employees, annually	Information Security & Privacy	☐ Security and Privacy Awareness Training
All executives, managers and Program Officers, annually	Financial Conflict of Interest	☐ Conflict of Interest Training ☐ N/A – I have already completed this training
All supervisors and managers, annually	EEO and Diversity	*Indicate which of the following fills this requirement:* ☐ EEO and Diversity Training for Managers and Supervisors ☐ N/A – I am not a supervisor or manager
All employees who telework, prior to approval of telework agreement	Telework	*Indicate which of the following fills this requirement:* ☐ Telework 101 for Employees ☐ N/A – I completed this course in the past 3 years ☐ N/A – I do not telework
All supervisors with employees who telework	Telework	*Indicate which of the following fills this requirement:* ☐ Telework for Supervisors ☐ N/A – I have already completed this course ☐ N/A – I do not supervise employees who telework
All supervisors, initially & every three years thereafter [A minimum of 32 hours within your first year and 16 hours every 3 years to cover the areas outlined in 5 CFR 412.202]	Human Capital Management [Topics including managing employee performance, mentoring and coaching, and NSF's performance management system]	*Indicate which of the following fills this requirement:* ☐ Leadership & Problem-Solving Skills ☐ NSF Performance Management ☐ Mentoring & Coaching ☐ Other: Click here to enter text. ☐ N/A – I am not in a supervisory position ☐ N/A – I have received training in all these areas in the past 3 years
All first-time managers	Transition to Management	*Indicate which of the following fills this requirement:* ☐ Transition to Management ☐ Other: Click here to enter text. ☐ N/A – I am not in a management position ☐ N/A – I have served in a management position in the past

Revised August 2011

Part II: Maintaining Expertise

*List activities that you will do to **maintain your current expertise** (e.g., examples include refresher courses, conferences, professional meetings).*

Activities to Stay Current in Your Field of Expertise:	Cost to NSF	Time Requirement
1.		
2.		

Part III: Enhancing Skill Sets

Choose the skill or skills that you will focus on this year, the types of activities you will do to enhance or broaden your skill in that area (e.g., internal course, external course, reading a book, volunteer or detail position, etc.), and the specific names of those activities. External courses are permissible if approved by your supervisor. If known, also indicate the approximate or known cost and the time requirement.

Focus	Type of Activity	Activity Name or Description	Cost to NSF	Time Requirement

Signatures

Employee Date	Supervisor Date
I have discussed this plan with my supervisor and obtained his/her approval for all activities listed.	*I confirm that this plan will help the employee contribute to NSF's mission, and I agree to make a good faith effort to support the completion of this plan.*

Revised August 2011

Development Action Plan	
Name	Date
Goal 	
What tangible outcomes will there be when I have achieved this goal? (*How will I know I did it?*) 	
What attitude/skills will I have developed when I achieve this goal? (*This tells you what knowledge/skills/attributes you may want to focus on.*) 	
How will I actually gain/build/develop these skills or attributes? 	
What resources might I need? 	
What problems or challenges might I encounter along the way? 	
How will I deal with these problems? 	
By when will I achieve this goal?	
What will be the impact on my career when I achieve this goal? 	

Development Action Plan	
Name	Date

Goal

What tangible outcomes will there be when I have achieved this goal? (*How will I know I did it?*)

What attitude/skills will I have developed when I achieve this goal? (*This tells you what knowledge/skills/attributes you may want to focus on.*)

How will I actually gain/build/develop these skills or attributes?

What resources might I need?

What problems or challenges might I encounter along the way?

How will I deal with these problems?

By when will I achieve this goal?

What will be the impact on my career when I achieve this goal?

Development Action Plan	
Name	Date

Goal

What tangible outcomes will there be when I have achieved this goal? (*How will I know I did it?*)

What attitude/skills will I have developed when I achieve this goal? (*This tells you what knowledge/skills/attributes you may want to focus on.*)

How will I actually gain/build/develop these skills or attributes?

What resources might I need?

What problems or challenges might I encounter along the way?

How will I deal with these problems?

By when will I achieve this goal?

What will be the impact on my career when I achieve this goal?

Development Action Plan

Name	Date

Goal

What tangible outcomes will there be when I have achieved this goal? (*How will I know I did it?*)

What attitude/skills will I have developed when I achieve this goal? (*This tells you what knowledge/skills/attributes you may want to focus on.*)

How will I actually gain/build/develop these skills or attributes?

What resources might I need?

What problems or challenges might I encounter along the way?

How will I deal with these problems?

By when will I achieve this goal?

What will be the impact on my career when I achieve this goal?

Development Action Plan	
Name	Date

Goal

What tangible outcomes will there be when I have achieved this goal? (*How will I know I did it?*)

What attitude/skills will I have developed when I achieve this goal? (*This tells you what knowledge/skills/attributes you may want to focus on.*)

How will I actually gain/build/develop these skills or attributes?

What resources might I need?

What problems or challenges might I encounter along the way?

How will I deal with these problems?

By when will I achieve this goal?

What will be the impact on my career when I achieve this goal?

Meeting Journal	
Name	Date

Main topics covered today

My movement towards goal achievement

What is going well?

What is a problem, and why is it a problem?

Things that I can do, or ask my mentor's advice, to deal with the problem

Attitudes that need to be changed to deal with the problem

What was agreed to be done before the next session?

Date of next session:

Topic or agenda for next session

New insights in today's session

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Questions?

Please Contact the NSF Mentoring Team:

Chantay Dudley
Cary Larson