



**Coach
Mentoring**



RSE

Introduction to Mentoring — Society of Research Software Engineering

**Guide for mentors
and mentees**

Table of Contents

What is developmental mentoring?	1
Developmental mentoring is characterised by	2
Mentor and mentee responsibilities	3
What are the responsibilities of a Mentee?	3
What are the responsibilities of a Mentor?	3
Roles of a mentor	4
Organisational Mentor	4
Benefits of mentoring	6
What's in it for the mentor?	6
What's in it for the mentee?	6
Mentoring Lifecycle	7
Starting your mentoring relationship	8
A mentoring agreement	9
Process for a mentoring conversation	10
Check-in at the start of each meeting	10
Checking in questions:	10
Main body of the conversation	11
Check-out and next steps	11
Checking out ideas:	11
Tips for maintaining relationships and overcoming challenges	12
Mid-point review	13
Managing virtual mentoring	14
Winding up the mentoring relationship	15
Questions you might ask include:	16

What is developmental mentoring?

Mentoring is a developmental dialogue between two people. It is a process of ongoing support and development, which can tackle issues and problems identified by the mentee.

Having a mentor or mentors can be one of the most powerful developmental relationships a person will ever experience. Anybody at any stage of their life or career can benefit from having a mentor, whether it is deep personalised learning with someone with substantially more experience or having a sounding board with a peer, or working with a younger or more junior person in a reverse mentoring situation to support in finding out a different perspective on life. Often individuals can benefit from having more than one mentor in their life if they are going through a period of intense change. Mentoring taps into a basic instinct most people share — the desire to pass on their learning or to support development and help another person fulfil their potential.



Most people from all walks of life and at all stages of their careers are able to identify deep, personalised learning they have obtained from a developmental relationship with someone with greater experience, who has taken a direct interest in them. Effective mentoring is a two-way learning relationship, which can develop the mentor as much as the mentee. It involves the creation of reflective space for the mentee, helping them to improve the quality of their thinking. The mentor will also provide professional friendship, role modelling, advice and guidance and be that sounding board and challenger that will really stretch the mentee in their learning zone.

Mentoring is a confidential, offline (not with your line manager) partnership between two people based on understanding and trust. Its chief aim is to build on self-reliance and self-confidence in the mentee. It is a positive, developmental relationship, which is driven primarily by the mentee.

Developmental mentoring is characterised by

- A need by the mentee to achieve some form of change for example, in their ability, their understanding or their circumstances.
- It involves a high level of trust and openness, which allows the mentor and mentee to address difficult, sometimes uncomfortable issues.
- Being out of the line of authority. Mentoring relationships do not develop easily between line manager and the direct report due to the power dimension present.
- Recognition of the value of learning together, even though mentor and mentee may have very different levels of experience.



Mentor and mentee responsibilities

- Have clarity as to what both your **expectations of the relationship** are from the beginning.
- Identify and initiate the learning goals. The mentee is in the driving seat in the relationship and **identifies the direction and focus** in the relationship.
- **Arrange the mentoring sessions** and keep your mentor informed if you want a longer time period between sessions, so they are not wondering what has happened to you. Show respect to them about postponing or cancelling sessions.
- **Be open to feedback** from your mentor and their ideas/suggestions and provide feedback to them on the mentoring relationship process and how you find it.
- **Reflect on your mentoring** and record key lessons learned and how to apply your learning.

What are the responsibilities of a mentee?

- Helping to identify and address the mentee's development needs.
- Supporting the mentee to achieve their **goals or relationship direction**.
 - Developing the mentee's capability, potential and the quality of their thinking.
 - **Listening** deeply, asking **questions** and giving **advice and feedback** when it is appropriate.
 - Empowering the mentee to take ownership of their own development.
 - Being responsible for the **process** in the mentoring sessions.

What are the responsibilities of a mentor?

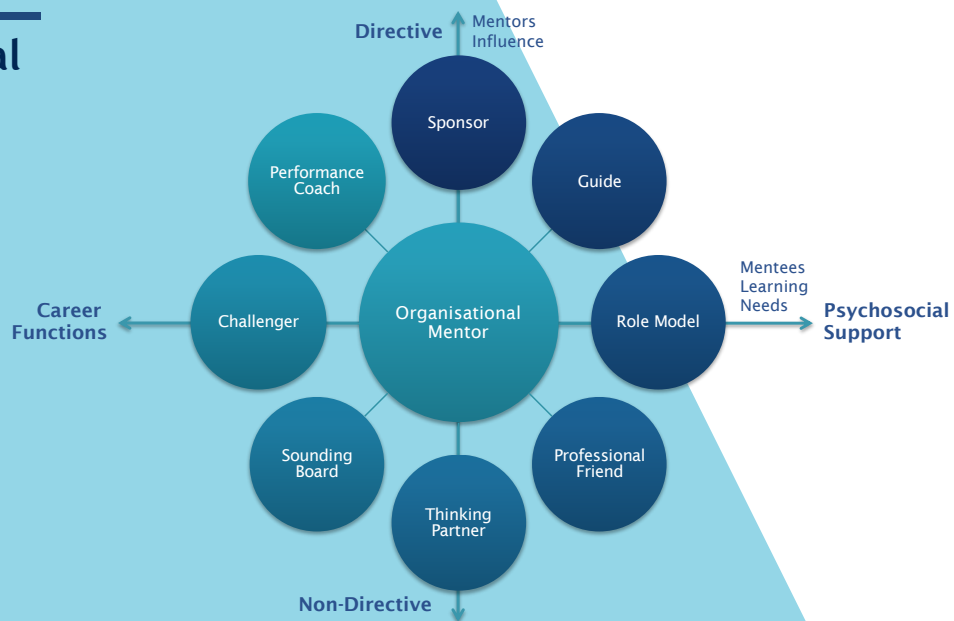


Roles of a mentor

Mentors can play a wide range of roles within a mentoring relationship. As mentors and mentees, it is useful to understand the behavioural matrix of a mentor.

A good mentor will understand when they switch between these different roles and from the mentee's viewpoint, it is advantageous to understand which roles your mentor can adopt, in order to maximise the usefulness of their support. The main roles are shown on the diagram describing Organisational Mentoring and their definitions are as follows:

Organisational Mentor



Sponsor — Being a Sponsor has the purpose of developing individuals' careers, promoting awareness of and opening up relevant opportunities for them to progress and ensuring they feel motivated and engaged with the organization.

Guide — Someone who is there to help the mentee think through their options and provide appropriate advice and guidance on a range of topics to the mentee. They are there to show the way by leading or advising, particularly thorough new situations and unexplored territory for the mentee.

Role Model — A Role Model mentor is one where the mentee looks up to them and admires their qualities and behaviours. Mentees often try to emulate and copy their mentors when they use them as a role model. The mentor can share stories of what they have experienced in their lives to support the mentee.

Professional Friend — A Professional Friend who will speak openly and without embarrassment or fear of being rude, about issues and concerns with the mentee that colleagues and line managers may avoid. Mentors in this role always keep appropriate boundaries with their mentees so the friendship does not become intimate in a way that may be detrimental to the relationship.



Thinking Partner — Taken loosely from the work of Nancy Kline, the Thinking Partner will not interrupt or ask questions until the mentee has done all the thinking they want to do, whether talking aloud or when they are busy thinking silently. This is the least interventionist of all the mentoring roles.

Sounding Board — A mentor who supports the mentee in thinking through situations and whose reactions to suggested thoughts, opinions and ideas by the mentee are used as a test of their validity, likely success, effectiveness or acceptability before the mentee takes them any further.

Challenger — The mentor uses a consistent level of challenge and critical debate to enable the mentee to access a point of new self-awareness, which is sometimes uncomfortable, but which helps the mentee to transform their views, knowledge and learning.

Performance Coach — This is where a mentor will support their mentee in a specific and focused area in order to improve their performance or productivity in their career. It can be as simple as helping with a presentation or preparing for an interview.

Benefits of mentoring

What's in it for the mentor?

The mentor may wish to take time to consider why they want to mentor others, or what is in it for them.

Here are some of the reasons for being a mentor:

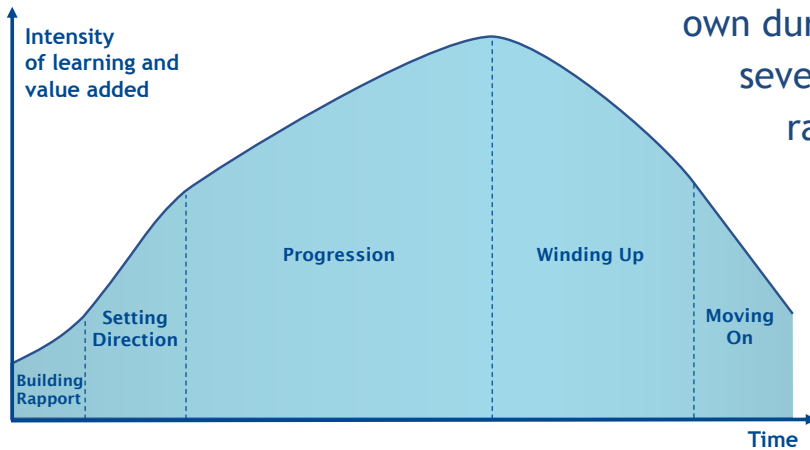
- More focus
- Increase in EQ
- Improved communication and coaching skills
- A more strategic perspective
- Better decision making/problem solving ability
- Improved reflection skills
- Greater love of learning!



What's in it for the mentee?

- Different perspective
- Challenge to assumptions
- Understanding of culture and politics
- Reputation and brand management
- Building networks
- Safe place to air concerns
- More informed career choices
- Increased self-awareness
- Increased self-confidence

Mentoring Lifecycle



Mentoring relationships tend to find their own duration in time, depending on several factors including the rapport and trust between the mentor and mentee, the intensity of learning, the supportiveness of the mentoring environment and the ease with which, the participants are able to respond to the relationship.

Most relationships move through recognisable stages:

- **Building Rapport** — This stage is critical in terms of whether the pair want to work with each other or not. At this stage the mentor and mentee will negotiate and agree how their relationship will be conducted.
- **Setting Direction** — Having at least one clear goal is important in creating a sense of purpose and urgency. A mentoring relationship without learning goals will not have momentum.
- **Progression** — This is where most of the time and effort is expended in a relationship. The mentor is supporting the mentee with the commitment to personal change the mentee has made.
- **Winding up and moving on** — Here the relationship is becoming more mutual in terms of learning and support and the mentee is becoming more self-reliant. The mentee is in charge of the relationship and the mentor's role is much more supportive.

Starting your mentoring relationship

Some mentees may feel nervous talking to someone they don't know about themselves or they may feel inferior to their mentor, as they have less experience. They may believe in the concept of mentoring, but do not know what to expect from the person they have been matched with. Here are some ideas to consider for your first meeting:



- **By getting to know each other**, and becoming relaxed, you can start building trust. To help the mentee to be relaxed and responsive, begin by establishing rapport together. The easiest way to do this and help them to be comfortable is to find areas of common ground in your lives. This may be around work issues, but do not be afraid to talk about your family, interests and hobbies as well. This will help the mentee to feel safe and start to develop trust with the mentor.
- **Preparing for your first meeting:** The mentor should consider their experience in the areas their mentee wishes to develop skills and knowledge in. Also the mentor should ask themselves what you want to get out of the mentoring relationship(it is a two-way learning experience) and let the mentee know why they are offering some of their time as it will help to build their trust further.
- **Start to develop direction.** What does the mentee want to focus on and why? Often this part of the dialogue generates the most focus and learning for the mentee as they clarify what is most important for them to work on within this mentoring relationship. If the mentee comes to the first meeting with very clear direction, then the mentor should challenge them on their thinking to ensure they are really working on the most important two or three learning objectives for them at this point in their life.
- **Don't rush the first meeting** and if you need longer to develop the direction then leave this to your next conversation.

It is important to clarify and align your expectations at the start of the mentoring relationship.

It is also important to establish an agreement for how you want to work together in the relationship and any boundaries you wish to respect. Quite simply this is an understanding of what you can expect from each other:

We recommend that you agree:

- The frequency and length of mentoring meetings and try to book these into your diaries in advance.
- That the mentee is responsible for arranging meetings and agendas.
- That you both will keep to arranged mentoring sessions and only cancel if unavoidable.
- To review your relationship regularly and provide each other with honest and open feedback about your mentoring relationship.
- That what is discussed in the sessions remains confidential and neither of you will disclose any of the information discussed without the permission of the other person.



Consider if there any boundaries or topics that you would prefer to be off limits in the mentoring relationship and agree them up front. You can always review these at a later date if one of you changes your mind.



Process for a mentoring conversation

We suggest that you have mentoring conversations every 4-6 weeks. Having a process to your meeting will also support your focus and learning.



Check-in at the start of each meeting

- Start by re-establishing your rapport and feeling comfortable together.
- Follow-up on commitments and actions from the last session.
- Mentee shares recent experiences (challenges, opportunities, and successes).

Checking in questions:

“How are you today?”

“What’s on your mind?”

“Any reflections/follow up from last time?”

“What are you feeling today?”

“What has happened since our last conversation?”

“What is the agenda today?”

Mentor and mentee explore the objective or direction for the meeting agenda. They will bring in the mentee's recent issues and challenges and discuss options and approaches. The mentor should feel free to share personal stories and anecdotes with the permission of the mentee.

The mentor will probably use a process model for this part of the conversation e.g. The Three Stage Process, GROW or just listen as a Thinking Partner. During this part of the conversation:

- Regularly review progress against the objectives.
- Assess the need to revise or update the objectives.
- Identify development opportunities and solutions.
- Encourage self-management – the mentor's role in the relationship is not to create dependencies by dictating problem-solving techniques and decisions to their mentee. Mentors should encourage mentees to manage the achievement of their objectives themselves and providing their experience as a source for ideas, letting the mentee choose and decide.

Mentors should support, listen, challenge and only guide and provide advice at the request of their mentee after gaining some insight themselves into the issues being discussed.

Clarify any commitments made and anything that needs follow-up, confirm next session date and agenda, but only if your mentee is comfortable to do this. Ensure you review both the process and outcomes from the session:

Checking out ideas:

- Mutual feedback on how the session went.
- What do you and your mentee want more or less of for next time? (Feedback, listening, advice, challenge etc).
- Where are we in the life cycle?
 - Building rapport
 - Setting direction
 - Progression through their objectives
 - Winding up the relationship.
- What are the main learning and action points from the meeting?
- Provide feedback to each other on what has been appreciated during the meeting.
- Do we want to organise the next session?

Main body of the conversation

Check-out and next steps

Tips for maintaining relationships and overcoming challenges

For an effective mentoring relationship:

- Review your relationship regularly.
- Prepare for and reflect on meetings.
- Give constructive feedback to your mentee when it is appropriate.
- Encourage challenge within the relationship and challenge your mentee constructively.
- Have goal or direction clarity.

You are likely to have reached a boundary if the mentor is:

- Being excessively drawn into an issue.
- Feels they lack the professional expertise to help.
- Is being pulled into the details of their mentee's job role.
- Feels they are struggling with the content of their conversation.



Encountering challenges in a mentoring relationship is normal; to overcome them it might be helpful to:

- Review your original expectations.
- Give open and honest feedback to each other.
- Challenge constructively.
- Re-agree how you want to work together going forward.

We encourage you to review the things that are going well and not so well in your mentoring relationship in the mid-point of the mentoring journey, and here are some questions to ask yourselves:

Mid-point review



- What do you appreciate about each other? And does your mentoring partner know that?
- What goals/direction has the mentee set at the beginning and which have they partially or fully achieved? Have new goals/direction been added?
- What have you both got out of the relationship? What do you enjoy about the engagement? What would you like to change?
- Are you both happy with the mentoring and have you met as often as you planned?
- Or have there been frequent meeting changes? (And if so, how could that be improved?)

Managing virtual mentoring

Some ideas on how to get the most from your virtual meetings

- Get to know each other early on:
 - Share the **formative** experiences that have made you who you are
 - Share the values that you believe in strongly
 - **Share** how your job meets your life goals
- Make sure you are both calm and undisturbed and still take time to prepare for the meeting
- **Spend longer** on your rapport building, both initially and at the start of each meeting
- **Don't rush** discussing what is going on for the mentee at the beginning as part of your check-in
- As part of your initial contracting, **agree** how the mentee will let the mentor know if they are feeling confused or in a bad place in this session
- Use the **camera** on your meetings if possible
- Pay more attention to relationship and rapport — allow time for the reflection during the conversation and **don't always rush** to fill in a silent gap
- How good are you on the phone/Skype/Facetime/Zoom/Teams?
- Have a back-up if the technology fails
 - Regularly check how each of you **feels** about the process
 - Listen to what your intuition tells you and share this, when relevant
 - Discuss how you can get more out of the technology

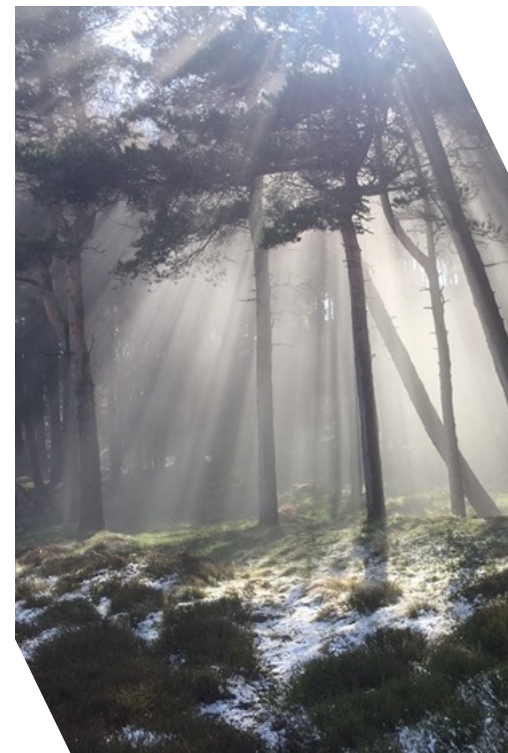


Winding up the mentoring relationship

By reviewing the relationship regularly, both mentor and mentee will be aware of when the relationship is maturing (rather than it just losing a little momentum from time to time). In this way, the ‘maturity review’ is less scary for both parties.

Reasons why it might end include:

- The mentoring programme is ending after an allocated time period or number of mentoring sessions.
- The mentee has achieved the agreed goals and outcomes and is running out of things to discuss.
- The mentee has gained confidence/improve their skills in connection with the learning goal, and now it is time for the mentee to navigate alone.
- The mentee’s goals or direction has changed significantly or their specific needs developed and they need a different type of learning support to mentoring, or another mentor with different expertise.
- Your conversations start to lack energy, you are both finding it difficult to sustain momentum in your discussions and you both feel it is time to move on. This doesn’t mean your mentee hasn’t fulfilled their learning objectives, just that they have run out of things to talk about.



Whatever the reason, do talk about it first in a meeting/conversation, and ensure wherever possible that it is a joint decision. This discussion should be honest, respectful and provide constructive feedback to the other, giving both of you time to prepare for the actual final winding up meeting. Don’t just send an email to close a relationship down.

In the final meeting discuss the following:

- Recognise that the formal relationship must come to an end.
- Discuss at least one meeting ahead how the ending will be managed.

- Create an agenda for the final formal mentoring session:
 - Review/re-define outstanding objectives
 - Finish within a mentoring session
 - Allow time for moving on.
- Review the relationship outcomes and any outstanding objectives. You may be required by the programme to provide a written reflection on this.
- Share what you have learned with each other — reviewing both the mentee's and the mentor's learning is key.

Celebrate your successes! And exchange thoughts about your frustrations as well from both sides.



- Thank each other for the time and commitment that has been put into the relationship.
- What comes next? Don't forget to discuss the future: Will you continue to meet or speak occasionally — either formally or informally? This is called 'keeping the door open' and is important when you have had a good relationship. Or it may mean winding the relationship up more gradually over a period of months with longer periods between conversations.
- The mentee may want to ask the mentor to help them scope out their future direction or action plan together.
- What or who will replace the mentor for the mentee? Allow time to plan what comes next, maybe the mentee needs signposting to other types of support or to find a new mentor or coach.

Questions you might ask include:

- What have we achieved together?
- What would we like to thank each other for?
- Do we want to continue in a more ad hoc, informal relationship and, if so, what will the intent of this be?
- When we look back on this relationship, what have we learned that we can apply to our future mentoring relationships?
- What or who will take the place of the mentor?