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# **An Introduction to Mentoring Principles, Processes, and Strategies for Facilitating Mentoring Relationships at a Distance**

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## **Introduction**

This digital learning object was developed for use primarily by faculty and students in the context of higher education, but it may also be a useful resource for individuals in professional organizations.

Mentoring is a learning process where helpful, personal, and reciprocal relationships are built while focusing on achievement; emotional support is a key element. Within mentoring relationships, mentees develop and learn through conversations with more experienced mentors who share knowledge and skills that can be incorporated into their thinking and practice. By comparison, tutoring or coaching is provision of academic and professional assistance in a particular area with a sole focus on competence.

The process of mentoring may be viewed under three models – the apprentice, competency and reflective models. In the **apprentice model**, the mentee observes the mentor and learns. In the **competency model**, the mentor gives the mentee systematic feedback about performance and progress. In the **reflective model**, the mentor helps the mentee become a reflective practitioner. This learning object subscribes to the reflective model in which mentoring is seen as an intentional, nurturing and insightful process that provides a powerful growth experience for both the mentor and mentee. You will be introduced to a mentoring relationship process that develops through four stages – preparing, negotiating, enabling and reaching closure.

Mentoring relationships can be formal or informal. **Formal mentor relationships** are usually organized in the workplace where an organization matches mentors to mentees for developing careers. **Informal mentor relationships** usually occur spontaneously and are largely psychosocial; they help to enhance the mentee's self esteem and confidence by providing emotional support and discovery of common interests.

Technology is increasingly used in the mentoring process because of its widespread accessibility and potential to overcome the barriers of time and geographical location between mentors and mentees. This learning object will introduce you to a number of benefits of technology-mediated mentoring as well as specific challenges that have yet to be resolved. You will also be introduced to selected strategies that would enhance communication and understanding when mentoring relationships occur at a distance.

It is important to realize, however, that the purposes and goals of mentoring programs and the human nature of mentoring relationships must drive the mentoring process, rather than the advantages provided by technology.

## **Goals**

This learning object has five goals:

1. Introduce mentoring as a learning relationship that is rooted in principles of adult learning.
2. Identify the key tasks and processes for enhancing the mentoring relationship.
3. Provide examples of process tools and strategies for understanding and operationalizing the mentoring relationship.
4. Identify the special challenges and opportunities that may occur when mentoring is conducted in a distance-learning context.
5. Introduce some technology-mediated strategies that could help to bridge the gap when mentor and mentee are at a distance from each other.

## PART ONE

### Introduction

History has shown us that human beings, like trees in an old forest, tend to thrive best when they grow in the presence of those who have gone before them. In Greek mythology, Athena, the goddess of wisdom, assumed the form of Mentor to look after and guide Telemachus, son of Odysseus, who had left home to fight in the Trojan war. The account of Mentor in *The Odyssey* points to several conclusions about the activity which bears Mentor's name (Anderson & Shannon, 1982). First, mentoring is an **intentional process**. Second, mentoring is a **nurturing process** that fosters the development of the protégé towards his full potential. Third, mentoring is an **insightful process** in which the wisdom of the mentor is acquired and applied by the beneficiary.

In contemporary times, mentors have played a vital role in the development of individuals in education and business organizations. Mentoring for a professional career became a topic of research in the mid-1970s. Caffarella (1992) defined mentoring as an “intense caring relationship in which persons with more experience work with less experienced persons to promote both professional and personal development” (p. 38). Daloz (1986) was more expressive in his description of mentors as guides who “lead us along the journey of our lives ... they cast light on the way ahead, interpret arcane signs, warn us of lurking dangers, and point out unexpected delights along the way” (p. 17).

The beneficiary of the process is often referred to as the **mentee**, but various writers have pointed out that the mentoring relationship could be a development opportunity for both mentors and mentees (Daloz, 1996, 1999; Albom, 1997; Hansman, 2002). Mentoring relationships have a potential to facilitate psychosocial development – mentored individuals enjoy higher self-confidence, self-efficacy, and self-assurance. Mentors too can benefit from enhanced self-confidence of their capabilities for reflective thinking and communication, as well as personal satisfaction of contributing to the discipline and the next generation.

Mentoring may be especially important to first-generation university students, first-generation professionals, and those entering fields dominated by persons of a different gender or race (Stalker, 1996; Ragins, 1997; Gordon and Whelan, 1998). In higher education, Lyons, Scroggins, and Rule (1990) found that mentors not only transmitted formal academic knowledge and provided socialization experiences into their chosen discipline, but also bolstered the students' confidence and professional identity, giving them a vision of the identity they might one day achieve.

Here we focus on mentoring relationships for academic development. This learning object provides the background information required for starting a mentoring program. It will be most beneficial to those who have always wanted to start a mentoring program but did not know how. This information will also be useful to those who are contemplating the introduction of technology to supplement their mentoring program.

## Principles of adult learning underlying the mentoring relationship

Almost a century ago, Dewey (1916) emphasized the importance of the individual experience in the learning process and the value of interaction in creating a positive learning environment. Later learning theorists such as Lewin (1951), Piaget (1969), and Vygotsky (1981) extended Dewey's ideas. Lewin conceptualized learning as deriving from here-and-now concrete experiences coupled with feedback loops. Piaget contended that learning involves accommodating concepts to experience and assimilating experience into concepts. Vygotsky introduced the concept of the “**zone of proximal development**,” which refers to the difference between an individual solving a problem independently and solving a problem together with a peer who is more advanced in knowledge or skills.

Knowles (1980) coined the term **andragogy** to refer to the facilitation of learning among adults. The current focus of mentoring as a process-oriented relationship that involves knowledge acquisition and reflective practice is consistent with the principles of adult learning promoted by Knowles:

- Adults have a need to be self-directing.
- Adults learn best when they are involved in planning, implementing and evaluating their own learning.
- Adult learners are motivated by an immediacy of application.
- An individual's life experiences are primary learning resources.
- Interactions with other individuals enrich the learning process.
- The role of the facilitator is to promote and support conditions necessary for learning to take place.

Based on these principles of adult learning, three assumptions can be made about the nature of mentoring:

1. Mentoring can be a powerful growth experience for both the mentor and the mentee.
2. Mentoring is a process of engagement that is most successful when done collaboratively.
3. Mentoring is a reflective process that requires preparation and dedication.

## Four phases in the mentoring relationship

Mentoring relationships progress through predictable phases that build on one another to form a developmental sequence. Zachary (2000) named four phases and applied an agricultural analogy in demonstrating how the phases can be connected:

- **Preparing** – This initial phase can be compared to tilling the soil before planting and can involve a number of processes such as fertilizing, aerating, and ploughing the soil.

Potential mentors similarly go through a variety of processes to assess their own motivations and readiness for the prospective mentoring relationship.

- **Negotiating** – Successfully completing the negotiating phase is like planting seeds in well-cultivated soil. There is a greater probability of fruition of the mentoring relationship.
- **Enabling** – This phase can be likened to nurturing growth as the seeds take root. It takes longer to complete than the other phases, as it is the implementation phase of the relationship.
- **Coming to closure** – Zachary compared this phase to reaping the harvest. Regardless of whether the mentoring relationship has been positive or not, this phase offers opportunity for the mentoring partners to harvest their learning and move on.

Understanding of the phases is key in successful mentoring relationships, including awareness that there may be overlaps between the phases. For example, during the enabling phase, one mentoring partner may move geographically to another location and thereby trigger a need to renegotiate the mentoring agreement or to experiment with technology-mediated tools to support the relationship.

In the following sections, each of the four phases will be described in greater detail and some process tools and strategies will be introduced.

### **Preparing for the mentoring relationship**

Individuals who have never played the role of mentor may assume that having subject expertise and experience would be adequate preparation for being a mentor. Zachary (2000) contended that mentors who assume the mentor role without preparing themselves are often disappointed and dissatisfied. She advised potential mentors to reflect on their motivation for engaging in a mentoring relationship and to assess their own readiness for the mentoring relationship.

Motivation has an impact on the sustainability of a relationship. Mentors also need to be comfortable using a range of process skills. Refer to the [motivation](#) and [readiness](#) self-assessment checklists in the appendix section.

The mentoring relationship that is advocated in this learning object is one that shifts the mentor's role from "sage on the stage" to the "guide on the side." The model of a mentor "for all seasons and all reasons" is an unrealistic expectation, and is a major reason why many qualified potential mentors shy away from the mentor role.

Instead of the mentor taking full responsibility for the mentee's learning, the mentee should learn to set learning priorities and become increasingly self-directed. If the mentee is not ready to assume this degree of responsibility, the mentor nurtures the mentee's capacity for self-direction

over the course of the relationship. Given the growing need for lifelong learning in all sectors of work and community life, it may be more desirable for an individual to have multiple mentors over a lifetime, and perhaps even multiple mentors at the same time.

In order to build a solid foundation for an effective mentoring relationship, mentors should have a clear understanding of their own personal journeys. In *Composing a Life* (1989), Bateson reminds us “the past empowers the present, and the groping footsteps leading to the present mark the pathways to the future” (p. 34). Zachary (2000) developed an exercise to help potential mentors reflect on their own journeys of learning as a prelude to understanding the mentee’s needs and aspirations. Refer to the [Mentor Journey Time Line](#) in the appendix for a set of questions that will trigger self-reflection.

Zachary suggested a second set of questions to help potential mentors prepare themselves for understanding the individuals they may be mentoring. The questions are also useful for testing assumptions if the mentor already knows something about the mentee.

Brookfield (1986) contended that an important element in facilitating adult learning is helping learners become aware of their own idiosyncratic learning styles. Learning styles refers to the pattern of preferred responses an individual uses in a learning situation. Brookfield contends that an important element in facilitating adult learning is helping learners become aware of their own idiosyncratic learning styles. Dialogue between the mentoring partners at the negotiation phase will assist the mentor in knowing when to step forward and when to hold back, and to respect different styles that may have a positive impact on the mentoring relationship.

## Negotiating the mentoring relationship

Negotiating is the phase when the mentoring partners come to agreement on learning goals and define the content and process of the relationship. It usually begins with a free-flowing conversation that takes place over one or more occasions and results in a shared understanding of the desired outcomes and delineation of responsibilities. At the end of this phase, the mentoring partners should ideally have collaboratively explored:

- Desired learning outcomes
- Criteria for measuring success
- Mutual responsibilities
- Accountability assurances
- Protocols for addressing problems
- An action plan for achieving the learning goal

Refer to the appendix for a list [questions](#): “Negotiating Outcomes and Processes” that you could pose to the mentee in your initial conversation. They will assist you in negotiating the process and the desired learning outcomes for the mentee.

One strategy used to support diversity in styles and to promote accountability is to have the mentee summarize the mentoring session at the close of each interaction and record what has been learned or request clarification on specific issues. These notes are reviewed by the mentee at the beginning of the next session and can be used as a trigger for conversation. Mentors can also make progress notes throughout the mentoring relationship.

One of the most important outcomes of the negotiating phase is **boundary setting** by both the mentor and the mentee. From the mentor’s perspective, boundary has to do with expectations of access and time. For example: Does being a mentor mean the mentee has unlimited access to you for the duration of the relationship? What is the limit? Both mentoring partners need to decide on when and where to meet, what the agenda will be for the meeting, and establish a mechanism to indicate a topic has been sufficiently explored.

## Enabling the mentoring relationship

Anderson and Shannon (1988) believed that good mentors should be committed to three values. First, mentors should be disposed to opening themselves to their mentees – for example, allow their mentees to observe them in action and convey to them the reasons behind their decisions and actions. Second, mentors should be prepared to lead their mentees incrementally over time. Third, mentors should be willing to express care and concern about the personal and professional welfare of their mentees.



Zachary (2000) pointed out that mentors, in addition to their expertise and experience, need to be familiar with specific **process skills** that can facilitate the mentoring process. The following strategies could be particularly useful:

1. *Asking questions* that will help mentees to reflect on and articulate their own thinking, for example
  - Could you tell me a bit more about what you mean by...?
  - It sounds as if this is the tip of the iceberg. Let's think about this some more and discuss it at our next conversation.
  - That's an interesting way of describing the problem. How would you apply that to individuals of a different gender?
2. *Reformulating statements* help mentors to clarify their own understanding and encourage mentees to reflect on what they articulated, for example
  - I think what I heard you saying was ...
  - My understanding is...
3. *Summarizing* helps to remind the mentoring partners of what has transpired and allows both parties to check out assumptions in the process, for example
  - As a result, I feel we have achieved...
  - We've spent our time this morning... but I gather you feel you'd rather...
4. *Listening for silence* – Silence can indicate boredom, confusion, discomfort or embarrassment. On the other hand, some individuals just need time out to think quietly.
5. *Providing feedback* that is authentic and suggests future action, for example
  - I like the way you... next time you might try...
  - You made a really good start with... what I'd like to see is...

Because of their experience and accumulated insights, mentors can guide a mentee's sense of the possible. Modeling behavior and sharing stories help to inspire and inform the mentee. By fostering reflective practice, the mentor helps the mentee to take a long view and create a vision of what might be. Reflective practice should be encouraged during and after the mentoring relationship.

Shon's (1983) reflection-in-action model illuminates the expertise that knowledgeable practitioners reveal in their spontaneous, skillful execution of a publicly observable performance. The experts often have difficulty in making the performance verbally explicit; they characteristically know more than they can say. Polyani (1967) coined the term **tacit knowledge** to describe this type of knowledge. Mentors can model reflection-in-action by pausing and verbalizing their thoughts about what they have done in order to discover how an action may have contributed to both intended and unintended outcomes.

Practitioners of a particular profession differ from one another in terms of their personal experiences and styles of operation, but they also tend to share a common body of **explicit knowledge**, a more or less systematically organized set of values, procedures, and norms in terms of which they make sense of practice situations. This explicit knowledge constitutes an acceptable professional conduct that mentors can share with their mentees. During the enabling phase of the mentoring relationship, mentees are gradually initiated into the traditions of a community of practitioners. They learn their conventions, languages, constraints, repertoire of exemplars, and patterns of knowing-in-action.

### **Coming to closure in the mentoring relationship**

When mentors and mentees are involved in a formal mentoring program, there is usually an externally structured timeline for the mentoring relationship to come to an end. In informal mentoring relationships, it is helpful for the partners to agree at the beginning on the process for coming to closure.

The process of coming to closure can be situated around a focused conversation about the specific learning that had taken place during and as a result of the mentoring relationship. Murray (1999) pointed out that a constructive conversation is a blameless, no-fault, reflective conversation about both the process and content of the learning. Both mentors and mentees share what each had learned and how they might apply and leverage that knowledge in the future.

Zachary (2000) suggested that even when a mentoring relationship has become beset with problems, reaching a learning-focused conclusion can turn the whole experience into a positive one. The mentor could initiate a conversation with the following approaches:

- Acknowledge the difficulty without casting blame – for example, “It looks as though we’ve come to an impasse ...”
- Consider what went right with the relationship as well as what went wrong – for example, “Let’s look at the pluses and minuses of our relationship so that we can each learn something from the process we have undergone.”
- Express appreciation – for example, “Although we haven’t been able to achieve all of your objectives, I think we were successful in one area. I attribute this success to your persistence and determination, characteristics which will be very helpful in your new job.”

Zachary (2000) further advised that it is important to celebrate the conclusion of a successful mentoring relationship. Mentors could acknowledge and celebrate the mentee's successful journey via both verbal and written expressions of appreciation. Verbal comments should be specific and focused on behaviours, for example:

- “I admire ...”
- “You have a real knack for ...”
- “I especially appreciated it when you ...”

Written notes from the mentor could offer a permanent record of support and encouragement as well as a memento. For example, the note could focus on:

- What you learned from your mentee
- An incident that has special meaning for you
- A motivational message for the future

Closure links the present to the future for both mentors and mentees.

## **Appendix**

### **Mentor Motivation Checklist**

Some reasons why mentoring may appeal to an individual:

- I like the feeling of having others seek me out for advice or guidance.
- I find that helping others is personally satisfying.
- I have a particular area of expertise that I want to pass on to others.
- I enjoy collaborative learning; a mentoring relationship could be an opportunity for this to happen.
- I find working with others who are different from me to be energizing.
- I feel it is my responsibility to help our staff become better contributors to our organization.
- Other people have made it possible for me to be where I am today; I feel I should do the same to help others accelerate their career development.
- I look for opportunities to further my own growth.

### **Mentor Readiness Checklist**

The following generic process skills for mentors are modified from Zachary (2000).

- Brokering relationships – laying the groundwork for mentees to connect with other people who can be resources for them.
- Coaching – helping mentees to fill particular knowledge or skill gaps by modeling the behaviors.
- Communicating –includes listening effectively, checking for understanding, articulating clearly, picking up on non-verbal clues.
- Encouraging – pushing at the right time and in an appropriate manner to inspire or motivate.
- Facilitating – establishing a friendly and respectful climate for learning; involving the mentees in planning and evaluating the learning.
- Goal-setting – assisting mentees in clarifying and setting realistic goals.
- Managing conflict – engaging the mentees in the solution of a problem, not solving the problem for them.
- Reflecting – modeling the process of articulating and assessing learning and considering the implication of that learning for future action.

## **Mentor Journey Time Line**

The following exercise for mentors is modified from Zachary (2000).

This exercise is intended to help you reflect on your own journey as an adult learner from the past to today. Think about your mentoring experiences and the individuals who made a difference in your life and helped you to grow and develop.

- Who were my mentors?
- At what point in my journey did they come into my life?
- What were those experiences like? (e.g. how did the experience enhance my learning; what methods did the mentor/s use to create a positive learning environment)
- What critical learning and changes in thinking did I gain from each of my mentors?
- What did I learn about being a mentee?
- What did I learn that could contribute to my own development as a mentor?

The following questions for mentors are modified from Zachary (2000).

Before the first meeting with your mentee, reflect on:

- What information do you have about your prospective mentee?
- What additional information do you need?
- What questions will you ask your prospective mentee to gather this information?
- What information can you gather from other sources? List sources and information that you can gather.
- What more do you need to know about your mentee as a learner in order to have a better sense of his or her journey?

After the first meeting with the mentee, reflect on:

- What insights does your prospective mentee's journey raise for you about your similarities and differences in life experiences and learning styles?
- What differences in approaches and styles could potentially have a negative impact on the mentoring relationship?
- What actions or approaches could potentially have a positive impact on the mentoring relationship?

## Negotiating Outcomes and Processes

The following questions for mentors are modified from Zachary (2000).

- What specific outcomes does the mentee wish to achieve as a result of this mentoring relationship?
- Are the desired outcomes achievable within the availability of your time?
- Are there other resources (human and other) that are necessary to achieve the desired outcomes?
- Are the desired outcomes capable of being measured?
- What should the mentee know and be able to do as a result of the mentoring process?
- In what ways can a successful relationship be evaluated?
- What **ground rules** should we mutually subscribe to facilitate the mentoring relationship?
- What actions can be adopted to check the progress of the mentoring relationship?

## Sample Ground Rules for a Mentoring Relationship

Mentors and mentees should determine which ground rules they will mutually abide by and establish checkpoints to explore how well each side is complying with them.

- We will manage our time well.
- We will each participate actively in the mentoring process.
- We will communicate openly and honestly while respecting our differences.
- We will respect each other's experience and expertise.
- We will clearly identify the times and locations for us to meet.
- We will safeguard **confidentiality**.

**Confidentiality** is a sensitive issue that merits deeper exploration. Mentors and mentees can check their assumptions about confidentiality by answering *yes*, *no*, or *not sure* to the following statements.

- What we discuss between us stays there unless you give me permission to talk about it with others.
- What we discuss between us stays there as long as we are engaged in our mentoring relationship.
- Some issues will be kept confidential, while others may not. We will alert each other about what needs to be kept confidential.
- If there is a demonstrated need to know, I can disclose our conversations and other element
- That pertain to the mentoring relationship.

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## GLOSSARY

**Andragogy:** A term coined by the adult educator Malcolm Knowles used to refer to the principles and processes used in facilitating learning among adults.

**Apprentice model:** a model of mentoring where the mentee observes the mentor and learns.

**Boundary setting:** Within the context of a mentoring relationship, the mentor and the mentee attempt to clarify their expectations of their mutual roles and responsibilities so as to avoid potential misunderstandings. The agreed boundary helps to define the limits of factors such as access, time, and place.

**Competency model:** a model of mentoring where the mentor gives the mentee systematic feedback about performance, progress, skills and expertise.

**Confidentiality:** An expectation or agreement that anything said or done within a relationship such as mentoring will be kept private.

**Elluminate®:** a software that can be used to facilitate online learning and collaboration  
<http://www.illuminate.com/>

**e-mentoring:** online or electronic version of mentoring.

**Explicit knowledge:** A more or less systematically organized set of values, procedures and norms of practice that members of a professional community subscribe to as acceptable professional conduct.

**Formal mentor relationships:** a type of relationship that is organized by workplace and organizations; not necessarily spontaneous.

**Ground rules:** Rules of procedure to guide interaction between mentors and mentees.

**Informal mentor relationships:** a type of relationship that is established spontaneously; largely psychosocial that helps enhance the mentee's self esteem and confidence by providing emotional support and discovery of common interests.

**Learning styles:** A concept that refers to certain preferred patterns of behavior according to which individuals approach learning experiences, including the ways in which individuals take in information and develop new understanding and skills.

**Mentee:** also known as protégé; one who is being mentored.

**Mentor:** trusted counselor or teacher.

**Netiquette:** formed from network etiquette; guidelines for online conduct to promote pleasant, agreeable interactions.

**Reflective model:** a model of mentoring where the mentor helps the mentee become a reflective practitioner; an important characteristic being the ability to critically analyze practice.

**Tacit knowledge:** A term coined by Michael Polanyi to describe the kind of experience-based knowledge that expert practitioners usually hold in their heads but find difficult to verbalize to others.

**Tutoring:** provision of academic and remedial assistance in a particular area with a sole focus on competence.

**Zone of proximal development:** refers to the difference between an individual solving a problem independently and solving a problem together with a peer who is more advanced in knowledge or skills.