

Walk With Me: A Guide to Mentoring

Legacy Project: Creating a community mentorship network to support PHA learning, sharing and practice



Committee for
Accessible
AIDS Treatment
Toronto, Canada

Thanks!

The Steering Committee of the Committee for Accessible AIDS Treatment (CAAT), would like to give a special thanks for the collaboration and contribution to the founding of the program, to the people from the following organizations:

ACCHO: African & Caribbean Council on HIV/AIDS in Ontario

ABRPO: AIDS Bereavement and Resiliency Project of Ontario

ETSN: Ethno-racial Treatment Support Network

OHTN: Ontario HIV Treatment Network

TPWAF: Toronto People With AIDS Foundation

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The Committee for Accessible AIDS Treatment (CAAT) is a coalition of more than 30 Ontario-based organizations from the legal, health, settlement and HIV/AIDS sectors. It was formed in 1999 to improve treatment and service access for marginalized people with HIV/AIDS. Since its inception, CAAT has been at the forefront of education, research, service coordination and advocacy on issues related to HIV, immigration and access to health and social services.

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A request for all participants – mentors and mentees:

We are happy you are here and ready to participate in the Legacy Project mentoring program. This is a work in progress and that means we appreciate your input and feedback on what is working really well for you, and what one or two wishes or concerns you have – tell us so that we can make it even better.

We want to make sure we have written the material so that it is meaningful to the people and communities who use it.

Your feedback is important!

Please do not hesitate to bring your ideas to the attention of the Legacy Project mentoring coordinator with CAAT.

Thank you!



Program Overview

Welcome to the **Legacy Project** and **Walk With Me: A Guide to Mentoring** – a resource for mentors and mentees.

The Legacy Project is a structured mentorship initiative created and coordinated by the Committee for Accessible AIDS Treatment (CAAT), to support long-term empowerment of people living with HIV/AIDS. The goal is to provide mentorship support to PHAs who have graduated from other capacity building programs so that they can apply their knowledge and skills to pursue career development, volunteer engagement in HIV prevention, community support or other areas of interest.

Walk With Me has been written for all the people involved as mentors and mentees in this mentoring program.

Walk With Me means we are together on a journey of learning, exploring and sharing our experiences so that we, PHAs can and will live fulfilling lives. A fulfilling life means that we can and will care for ourselves, build the capacity of ourselves and others, and build strength in our communities through building skills, volunteering, working, leading, and educating people.

Walk With Me is a set of tools, tips and techniques that have been created in a user-friendly format to support all the mentoring relationships of the Legacy Project: one-on-one relationships, peer-to-peer mentoring, group mentoring, and specialist/expert mentors.

The approach is “organic” – meaning one can be a mentor, or a mentee or both, or an expert for one topic or event, or all at the same time!

It is all about learning, growing, and building skills and capacity in our communities. In the end, everyone will be learning valuable leadership skills that can be used in all parts of our lives. Mentorship is a rewarding experience where the lived experiences of all participants are highly valued. Our stories have many lessons worth sharing – this is how we make a difference in the life of another.

As mentors and mentees may be in multiple roles, we have tips and techniques for both within this one kit. Tools, tips and techniques provided here are organized in a practical application format, without extensive background or theory. A bibliography is available with the CAAT program coordinator for those who wish to explore mentoring in greater detail.

“The greatest gift you can give another is the purity of your attention.” Richard Moss



How this Manual is Organized

Introduction

This section introduces the goals and objectives of the Legacy Project and general information about mentoring. For people who have participated in PHA training with the community organizations, you will find the tips, techniques and models provided here to be consistent with or summarized from those training resources. Mentorship is intended to support your prior learning.

Being a Mentor: Tips and Techniques

In this section, we introduce the role of the mentor, and a selection of tips and coaching/mentoring techniques to help you in your role. A technique is a method of questioning and supporting another individual so that the conversation is useful to them.

Being a Mentee: Tips and Techniques

In this section, we introduce the role of mentee. For you, we have provided self-assessment processes and goal setting techniques that will help you gain the most from your mentoring relationships. A technique is a method of questioning, exploration and supporting another individual so that the conversation is useful.

Group Mentoring Tips and Techniques for Mentors and Mentees

This section provides mentoring and coaching tips and techniques to support the mentoring relationship within a group environment. Use what you need, when you need it for the matter at hand.

Mentor and Mentee Orientation to the Mentoring Program: Foundations of Mentoring

This section contains some of the materials used during the orientation workshop.



Frequently Asked Questions

What is mentoring?

A learning relationship between individuals based on the mentee's/participant's learning goals. The mentee is learning from the shared experiences of someone who has "been there before". Most of the time, both mentor and mentee learn and develop as a result of the relationship.

Can I be a mentor and mentee at the same time?

Yes. We highly value the experience people bring to the relationships. You may be living with HIV for many years now and have considerable experience with navigating the health and services systems and would enjoy being a mentor to someone new to the system. At the same time, you may be interested in developing your community leadership skills and would like to be mentored by someone more experienced in community leadership.

Am I expected to give advice and have the answers?

No. You are expected to be a listening ear when needed, help access resources available in the communities and with service providers, share your experiences, provide input and ideas for the mentee to make their own decisions. As a mentor, you help out where you can, while respecting that you are not providing therapy.

How long will I be a mentor for? How long will I have a mentor for?

The program is designed to have all participants establish a mentoring agreement. Together you may decide how long you will be in the relationship. Some general guidelines will be provided to you at the orientation session. At the orientation session, together you will decide how to manage your relationship, where you will meet, when to review the relationship, determine when to end or decide to continue, and set goals.

Will I have training and support to be a mentor/mentee?

Yes. The Legacy Project believes it is important for all participants to have an orientation, ongoing support, learning workshops, and an opportunity to share learning amongst each other. The Legacy Project Coordinator will organize development sessions.

How will I be matched?

On the intake-application (available from CAAT or a participating agency) you are to identify those areas where you would like to have a mentor. Those choosing to be a mentor will complete the same form to identify those areas where they believe they have the most to offer. We will match learning needs to the mentor's offering. At the same time, we will endeavor to match by requested demographic information and proximity.



Introduction

Mission of CAAT: to improve the health of PHAs in the GTA by promoting access to services and capacity building of PHAs, especially those who are newcomers or from culturally diverse communities.

The Legacy Project Vision: From many roots comes a community of people who live and learn from each other without limitation of background and health status. We work together, empower each other to live, learn, grow and contribute to the betterment of all who live with HIV.

Objectives of The Legacy Project:

- ◆ Increase the level of social, communal and professional engagement of PHAs
- ◆ Increase the level of social inclusion and access of services organizations
- ◆ To increase collaboration and partnerships amongst different generations of PHAs and across different sectors of service organizations.

Specific Objectives:

- ◆ Program participants develop their networks of support and build resiliency in their life:
- ◆ Building trust with peers at all levels and within diverse populations
- ◆ Building support systems within and outside the workplace to make meaning of my experiences
- ◆ Building relationships of influence for sustainable community building
- ◆ Coming to terms with career decisions and expectations management with respect to how I make a difference

Core Activities:

- ◆ Structured mentorship support with measureable outcomes
- ◆ Linked to community network of learning with continuous skill development
- ◆ Experiential learning opportunities through mentored practice
- ◆ Individual and team mentorship support and reflective learning
- ◆ Establish new partnerships and network to create mentoring and experiential learning opportunities

Our Values: *(What is important to us and guides our behaviour in learning)*

- ◆ We acknowledge and value lived experience
- ◆ We embrace equity and diversity
- ◆ We inspire self efficacy and confidence building
- ◆ Trust and mutual respect are the foundation of everything we do
- ◆ We share learning and grow together



Mentoring builds leaders for today and tomorrow

Legacy Mentoring Program Phases

The three phases of the Legacy Mentoring Program illustrates the evolution and flow of the mentor and mentee through the relationships. The development needed and the mentoring offered varies by stage.

Participants may be in dual roles – mentor and mentee; some may be in one-on-one relationships, facilitate small groups, and/or be a resource of special expertise.

Participants may also be involved in work placements within and outside the PHA communities. Such placements may be: voluntary, part-time, co-op, assignments, etc. All will be in support of building work experience.

Phase 1: Mentoring Orientation

- **Characterized by:**
- Becoming familiar with what mentoring is
- Building trust and working with boundaries within multiple roles
- The impact of HIV on life goal planning
- Establishing and managing expectations
- Recognizing the strengths of mentors and mentees
- **Mentors and Mentees work together to launch the relationship**
- **Mentor Type:**
- High empathy & relationship skills
- Knows the social/community support system
- Reinforce & support HIV training programs
- Experienced with peer-support processes
- **Preparation for mentoring:**
- Mentor and mentee joint orientation session: **Foundations of Mentoring**
- **Mentor Reflective Practice**

Phase 2: Life- Work- Volunteer

- **Characterized by:**
- Re-evaluation & new life goals
- Establishing new dreams/new goals
- Ongoing re-invention of self
- Ways of coping: spirit, health, physical, emotional well being
- Community building
- New vision for the self
- Strengthening relationships
- Maturing of personal identity
- **Mentor Type:**
- Leadership qualities in coaching; problem analysis; context-setting and strategic thinking
- Established network of resources
- Broad experience living with HIV
- Resourceful and resilient
- **Becomes a mentor to:**
- Others within this area of personal and career development
- **Preparation for mentoring**
- Mentor development for Phase 2: **Foundations of Mentoring**
- **Mentor Reflective Practice**
- **Mentoring Supporting Reconnecting**

Phase 3: Leadership and Giving Back

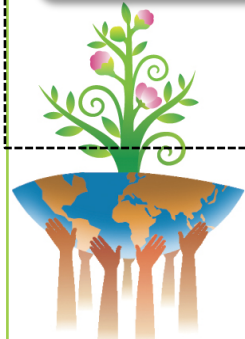
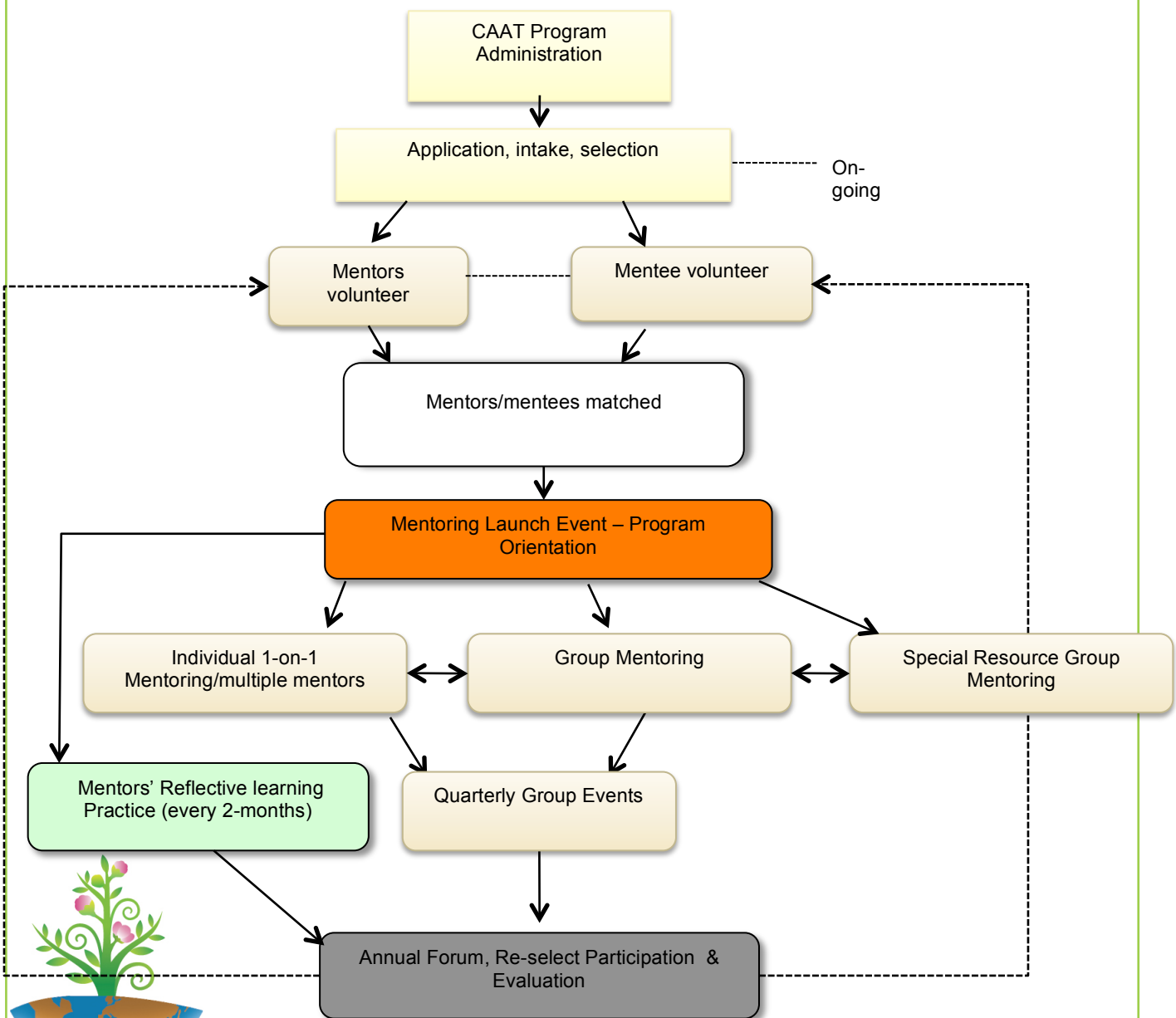
- **Characterized by:**
- Life & career /building established/maturing
- Community building
- Leadership development
- Advocacy
- **Mentor type:**
- Leadership experience: advocacy; community building; organizational leadership; Board experience
- Established network of resources
- Relationship builder
- Facilitator
- **Becomes a Mentor to:**
- Those peers within Giving Back
- Those in Reconnecting
- Develop new mentors
- Be a resource to other mentors
- **Preparation for mentoring**
- Mentor development for Phase 3:
- **Foundations of Mentoring**
- **Mentor Reflective Practice**
- **Mentoring Supporting Reconnecting**
- **Mentoring Supporting Giving Back**



The Legacy Mentoring Program Model

Note: This model considers the following options for all mentoring partnerships:

- ◆ Mentors and mentees may be in multiple roles
- ◆ Participants may be in one-on-one partnerships, group, special resource experts, forum participants, or any combination of mentoring relationships
- ◆ Mentor and mentee roles may change over time thus they will be invited to re-select how they wish to participate from time to time



Definitions

Mentoring

Mentoring is a learning relationship between individuals based on the mentee and mentor's goals. This developmental relationship is focused on the overall growth of all participants in the practical every-day application of learning from:

- Other programs supporting PHAs
- The lived experiences of PHAs
- Those closely connected to the PHA communities.

This blended approach incorporates many processes and techniques including preparation workshops, reflective practice sessions for mentors, workshops and symposiums for mentors, mentees and those wishing to become involved, one-on-one mentoring, co-mentoring and group mentoring.

Mentor

The mentor has the knowledge and life experience as one who “has been there before” and can therefore ask insightful questions, assist with the exploration of options, and determine the real needs of the mentees in relation to their goals.

Mentee

The mentee receives assistance of a mentor in a learning relationship. The mentee invests time and effort to learn from the relationship – develop skills, achieve insight, and the perspective needed that is important for the attainment of their goals.

Mentee Group or Co-mentoring relationships

Mentees/mentors working together as a group with common goals are also peer-mentors to each other. Mentees in a group have a responsibility to support the learning of each member of the group.

PHA

A person living with HIV/AIDS.

Stigma

HIV/AIDS-related stigma refers to prejudice, discounting, discrediting, and discrimination directed at people perceived to have AIDS or HIV, and the groups and communities with whom they are associated. Closely connected is the concept of discrimination, referring to the unfair and unjust treatment of an individual based on her or his real or perceived HIV status. ²

Technique

A technique is a method of questioning and supporting another individual so that the conversation is useful to them.



Managing Expectations

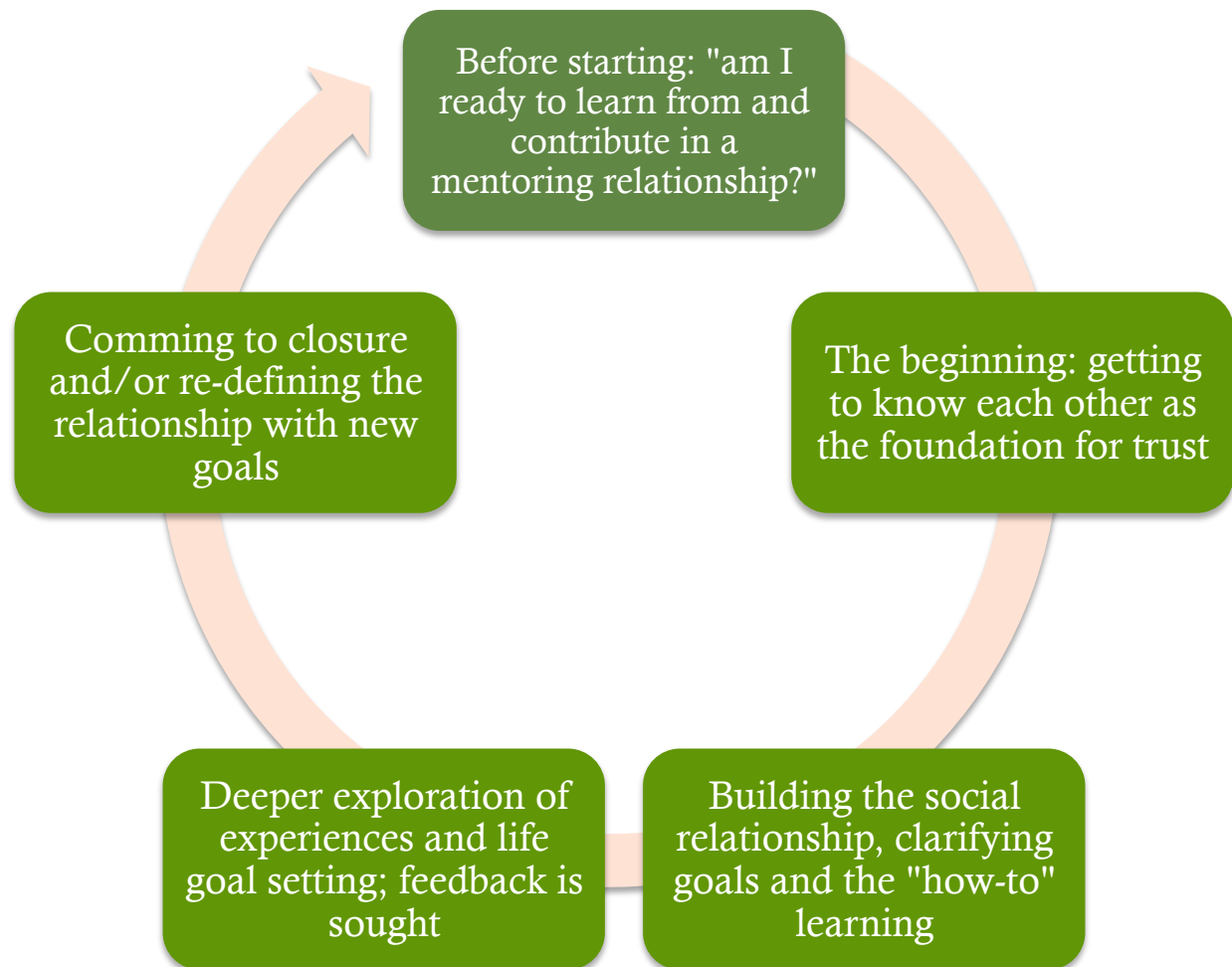
Clarifying expectations is important to do as it supports a healthy relationship. Mentors and mentees often enter the relationship with expectations of each other that may be hidden and not discussed. To create openness and prevent disappointment, the following tips have been provided.

- ◆ PHAs live within a web of relationships: you may be mentor, mentee, colleagues, friends, clients of service providers, etc. Please take the time to discuss how you will manage the relationships you have with each other and how you will address privacy, discretion, respect and conflicts as your relationships evolve
- ◆ Spending time with your mentor working on issues, problems and projects or committees together helps to build trust
- ◆ Both mentor and mentee need to be prepared to share goals and dreams. You can support each other's efforts to achieve goals
- ◆ As a mentee, you own your own development. It is up to you to identify your goals for mentoring and to ask for the type of help that you need
- ◆ Be open to the feedback you are requesting. There will be times when the feedback will be difficult to hear; yet it may help you a lot. Be sure to take the time to think about it and ask more questions to be clear
- ◆ When you receive feedback, ask questions to make sure it is clear for you
- ◆ It is your responsibility to follow-up on the insights provided and doing what you say you are going to do – you are accountable to yourself
- ◆ Nothing is automatic – there must be time invested in the relationship for the relationship to work. Set a schedule to meet, and keep to your schedule. Having coffee once every three months is not enough to build a relationship. Make a plan that meets your needs. There will be times an agenda is useful and other times, a more relaxed approach works well.



Cycle of the Mentoring Relationship

The following diagram illustrates how the mentoring relationship changes over time. The mentors and mentees spend time getting to know each other and begin the process of developing the early social relationship that is critical for establishing trust. Once trust exists, more complex issues and concerns are brought forward for exploration, discussion and feedback. True learning and change take place when trust exists. The relationship moves to closure when significant progress on goals has been achieved. A new relationship may begin, or new goals established in the same relationship.



Building Trust

Effective mentoring relationships are built on a foundation of trust. Taking time to build trust is a large factor in getting the desired results and in being happy with the relationship.

Trust is built on the ongoing demonstration of integrity, competence, consistency, loyalty and openness. The mentee needs to believe that the mentor's input and insight, is well thought through, based on experience and provided in an effort to help the mentee succeed.

The responsibility for building trust is shared:

- ◆ Mentees must openly share the issues that worry them and be aware of their own vulnerability
- ◆ Mentors, must openly share the learning lessons they have had from their own history – including their own struggles, failures and vulnerability
- ◆ Together, you must work to support your commitment to respecting the boundaries you need to manage the roles you have within the PHA communities.

Elements of Trust:

- ◆ It is earned over time
- ◆ It grows with genuine interest in the other person
- ◆ It involves taking risks – it builds by taking one small risk at a time
- ◆ It takes a long time to build, and can easily be destroyed

What can we do to build trust in our relationship?

"I have learned more about love, selflessness and human understanding in this great adventure in the world of **AIDS** than I ever did in the cut-throat, competitive world in which I spent my life" Anthony Perkins

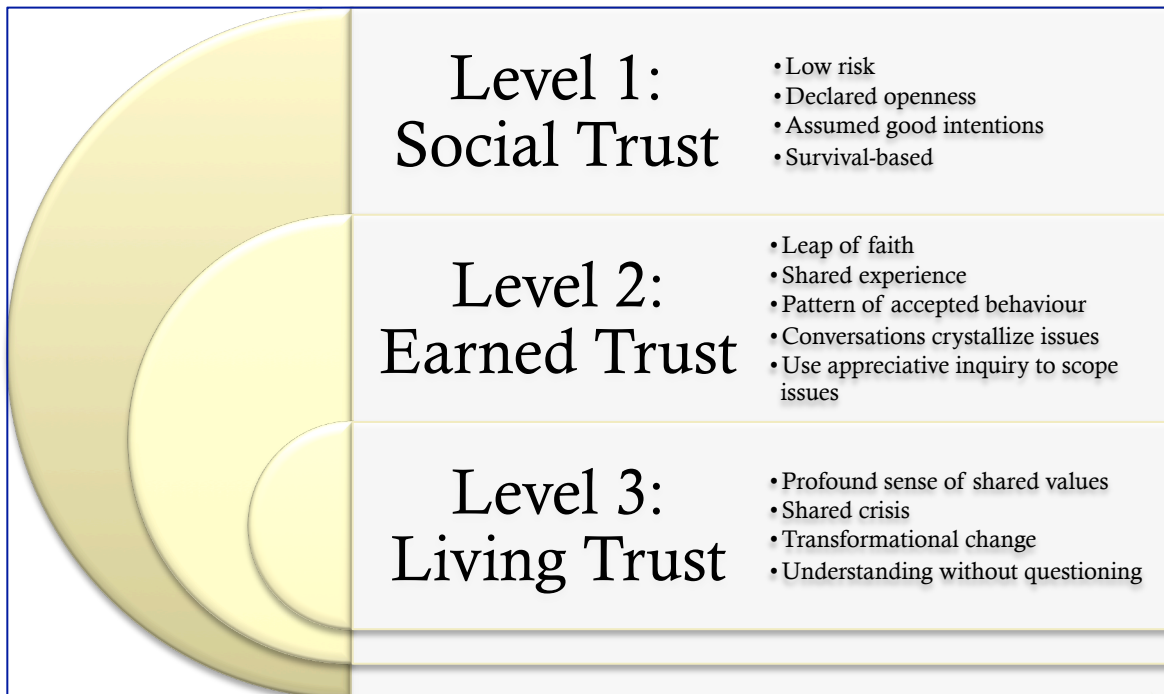


Boundaries and Trust in Relationships

People have boundaries in relationships as well as roles. The following chart shows the different levels of trust. To move from one level to another, there must be an opening of a boundary. For example, at level 1: Social Trust, an individual would be open to feedback on style, approach and layout of their resume. At level 1, feedback on how one is positioning themselves for a specific role, may be discounted with a “who are you to tell me...” attitude. This is a boundary in the form of an attitude and thought process. To open that boundary would require permission and movement to the second level of trust – Earned Trust.

When trust has been earned, difficult feedback will be both welcome and integrated into learning. For example, the provider of the feedback says: “I can see from your résumé that you are positioned for an analyst role. This surprises me because I see your strengths in operations. If you get into an analyst role, you may find it frustrating because you are action oriented – I don’t see this working for you”. The receiver of the feedback is open and would like to understand more; “tell me more about how you see me in operations?”. Learning will be integrated into a new approach.

To move to Level 3 is to have such a deep understanding of each other that there is no need to question.

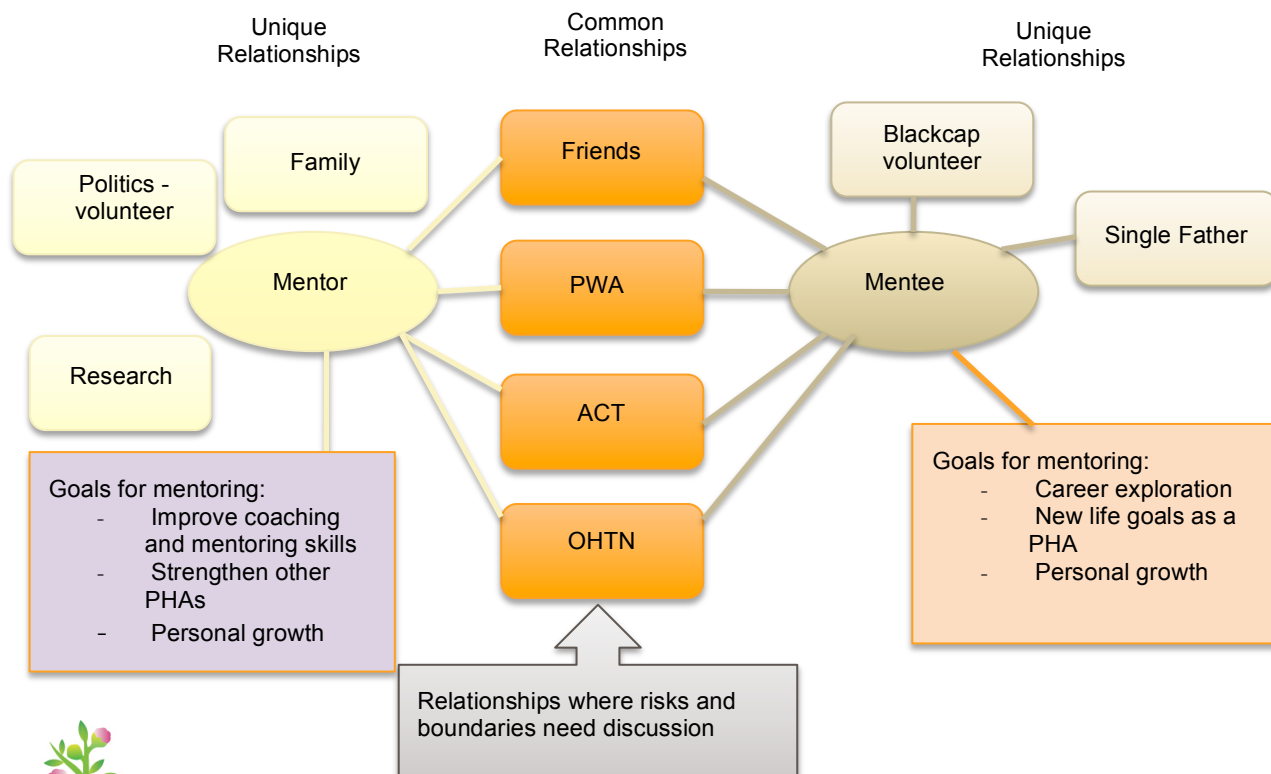


Boundaries and Roles Within the PHA Communities

There are a variety of roles PHAs play within and across communities. It is important for mentors and mentees to talk about their roles in the different communities, to identify the areas where potential conflicts could exist, and establish the boundaries.

The goal is to create the environment where mentors and mentees feel safe to share their personal experiences.

The diagram below is an actual example of the relationship mix of a mentor and mentee. Where relationships are common, the mentor and mentee need to identify the risks (for example, how they would handle the confidential nature of their relationship, areas where conflict of interest might arise, or how they may handle conflicts, to name several) and clarify the boundaries such that they build a safe environment for their relationship to grow.



Determine your Boundaries and Roles Within the PHA Communities

Instructions for mentoring pairs to work together (this page is repeated on page 63, in the Mentor and Mentee Orientation to the Mentoring Program section):

1. Identify the goals of your mentoring relationship
2. Discuss the various roles and relationships you each have
3. Determine if and where there are common relationships (for example: working together on a project, on a committee, as volunteers, on a Board of Directors, friends in common, social circles overlap, service user or service provider)
4. Identify all the potential risks (for example: being too friendly in a professional environment; being asked to be a reference for a selection interview; friends asking personal questions about your mentoring relationship; asking for a reference in support of a job)
5. Establish your own guidelines/boundaries for your relationship (use the Guidelines/Code of Conduct on page 18 as a reference)



The Legacy Project Guidelines

(Code of Conduct)

To have meaningful involvement in organizations and communities means that your mentoring relationship will not be compromised by any of your other relationships. Use the following guidelines as a foundation:

1. Confidentiality

- a. Get permission before sharing information
- b. Conversations are of a personal nature – HIV/health, social, economic status are private matters not to be shared
- c. We will discuss and clarify what is “open” and “closed” confidential information

2. Communications

- a. We will have a mutual discussion on how we talk to others about our mentoring relationship
- b. We will have respect for the mentoring agreement we create
- c. We will discuss our mutual goals for the relationship
- d. We will regularly “check-in” with each other on how we are meeting each other’s expectations
- e. We will make an effort to support each other’s learning goals

3. Conflict of Interest

- a. We will disclose to each other when we are facing a potential conflict of interest and mutually determine a means of addressing the issue

4. Mutual Respect

- a. We will discuss our mutual goals and expectations of each other in how we manage our relationship
- b. We will discuss how we will contact each other, arrange to see each other, and how we will manage all the logistics of our relationship
- c. We will demonstrate respect for each others’ personal, private and emotional space and ask permission to enter, provide feedback or make requests
- d. We will have a mutual discussion on transitioning and/or bringing the relationship to closure



What to do if the Relationship is not Working

Not all relationships will be perfect, all the time. This is to be expected. In any new relationship, there is a period of discovery that may be awkward in the beginning. It is important to talk about it to find what is causing the discomfort. Within the PHA communities, you may find moving from a friend relationship, to a mentoring relationship, or, a service support relationship to a mentoring relationship, awkward at first and that is okay. To build a different relationship:

- ◆ Review your expectations: Do you have an existing relationship that will change? Discuss how it might change and what is important for you in a good relationship
- ◆ Review the boundaries you agreed to at the beginning: Is it possible there is a conflict related to a boundary?
- ◆ Review your values and the values of your mentor/mentee: Is the issue related to a difference in your values that cannot be bridged?
- ◆ Review the timing/availability/location and commitment: Is it a timing/availability/location issue that can be worked out?
- ◆ Review privacy and confidentiality agreements: Are there other relationship sensitivities that are not immediately visible that may have an influence on the success of your relationship? Discuss your thoughts to see if a resolution can be found.

Come to closure with the relationship:

It is possible there is a significant conflict or roadblock that will result in the relationship being brought to a close. Recognizing the “miss-fit” early is the best thing to do. At the time of setting up your mentoring agreement, talk about a “no-fault” close if it is clear the relationship will not thrive.

What to do next:

- ◆ Contact your mentoring coordinator at CAAT to establish a “closure” plan and request a new match.



Coming to Closure and New Beginnings

It is normal for relationships to evolve and come to closure. It is then time to re-evaluate, change, evolve, or close the formal mentoring relationship. Should you choose to change and create a new beginning, then discuss your progress, how you have contributed to each other's learning and establish new goals.

It is time to say "thanks!"

Honour your shared learning and experiences; these will have an impact on you for many years to come.

Become a mentor and make a difference in the life of another person.

"We make a living by what we get, but we make a life by what we give." Winston Churchill

"No one who achieves success does so without the help of others. The wise and confident acknowledge this help with gratitude." Alfred North Whitehead



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“Everyone thought I was going to die like a year later. They didn't know. So I helped educate sports, and then the world, that a man **living** with **HIV** can play basketball. He's not going to give it to anybody by playing basketball.” Magic Johnson



Being a Mentor

Mentors are people who have a combination of knowledge and the lived experience to bring wisdom as a guide to learning.

Some mentors will be PHAs; some will have considerable experience within the PHA communities. All will have travelled the road before you and have established themselves. All the mentors will have the dedication and interest in developing others. They have well-developed people-skills and are continuous learners. And, most of all, they are comfortable enough with themselves, where they are in their life and their role in the process to set their needs aside and focus on their mentee.

Mentors regularly report they believe they learn as much as the mentee from the relationship. People say the mentor behaviours they most admire are:

- ◆ They make an effort to understand the background of the mentee
- ◆ Being consistent and dependable
- ◆ Helping the mentee think things through
- ◆ Finding ways to add to the mentee's thoughts, not solve their problems for them
- ◆ Not assuming their way is the only way
- ◆ Asking for a frank discussion and feedback
- ◆ Providing the mentee with ideas, options and alternate ways for better decision making
- ◆ Being able to laugh at themselves

"The glory of friendship is not the outstretched hand, nor the kindly smile... it's the spiritual inspiration that comes to one when he discovers that someone else believes in him and is willing to trust him with his friendship."

~Ralph Waldo Emerson



How Mentors make a Difference

The mentoring relationship is focused on supporting PHAs in living a meaningful life. PHAs may choose to contribute through volunteering, gainful employment, education, community and organizational leadership.

Mentees benefit most from mentors in:

- ◆ Being challenged to try new and different things, as well as difficult things as a way to help grow and develop
- ◆ Exploring options and setting goals for the present and future
- ◆ Working through issues, problems, and challenges
- ◆ Identifying the skills required by market demands
- ◆ Being guided through the PHA training services and process where needed
- ◆ Building the practical skills to live a good life
- ◆ Selecting technical skills up-grading programs/re-training programs and resources
- ◆ Acquiring/accessing support through the job search process
- ◆ Establishing support networks
- ◆ Building long-term networks for ongoing professional growth
- ◆ Supporting and encouraging efforts to become established in the community
- ◆ Building leadership skills



Dynamic Listening Technique for Mentors and Mentees

The 5 steps of dynamic listening for effective feedback and problem solving are as follows:

Step 1: Being Present

Being present means: I am here, attentive and engaged in the conversation. I maintain my focus on the other individual in every way: how they are emotionally, their tone of voice and spoken words. I demonstrate that I care about the conversation.

Step 2: Recognizing and Working with the Mutual Nature of the Conversation

My effort here is to make sure the conversation is good for the both of us. I will make an effort to be supportive of the other person.

Step 3: Delaying Judgment

As the other person speaks, I must halt the natural process of making a judgment (they are right/wrong/interesting/boring or thinking of a response before they are finished), and open my mind to listen and gather more information.

Step 4: Ask Questions

Here, I will practice using “what, when, where, who, how” questions with the intention of finding out more information. I want to find out the hidden issues and what might be going on behind the behaviour, attitudes and experiences that often hide the most important issues.

Step 5: Reflecting for Wisdom

Here, I will take the time to reflect on the conversation, the ideas generated, and feedback received. What did I learn as a result of the experience?



“Be who you are and say what you feel because those who mind don't matter and those who matter don't mind.” Dr. Seuss

Practice: Dynamic Listening Technique for Mentors and Mentees

Instructions for Practice: Being Present and Delaying Judgment (3 minute practice)

1. Work in partners
2. One partner is the “listener/mentor” the other partner is the “speaker/mentee”
3. Using the Lifeline Exercise, the speaker is to select one element or story to talk about
4. The speaker is to tell the story
5. The listener is to listen only. Stay focused entirely on what the speaker is saying.
 - The listener is NOT to ask questions or make comments on what the listener is saying.
 - The listener will use natural body language that conveys to the speaker that they are listening (eye contact, head-nodding, leaning forward)
6. The facilitator will de-brief the experience with you
7. Switch roles and do the practice a 2nd time

Instructions for Practice: Being Present, Delaying Judgment and Asking Questions (10 minute practice)

1. Work in partners
2. One partner is the “listener/mentor” the other partner is the “speaker/mentee”
3. Using the Lifeline Exercise, the speaker is to select one element or story to talk about
4. The speaker is to tell the story
5. The listener is to listen only for the first 3 minutes. Stay focused entirely on what the speaker is saying
 - The listener may ask questions using: what, where, when, how questions
 - The listener will use natural body language that conveys to the speaker that they are listening (eye contact, head-nodding, leaning forward)
 - The listener is to avoid using WHY questions
 - The listener must not interrupt
6. The facilitator will de-brief the experience with you
7. Switch roles and do the practice a 2nd time



3 – Common Conversations Technique

As the trust in a mentoring relationship develops, the types of conversations mentors and mentees have, will also change. These conversations will be more open, accepting and “deep”. These three conversations can be seen as flowing through three levels:

Level 1 – Relationship Building Conversations

Level 2 – “How-to” Conversations

Level 3 – Strategic (deep) Conversations

The following are examples and processes to move the conversation from friendly Relationship Building, to one where real learning can take place – the Strategic (or deep) Conversation.

Level 1: Relationship Building Conversations:

This is the beginning of all new relationships. It is important to start with social conversations – don’t rush this stage as it builds trust, comfort and sets the foundation for the “How-to” and Strategic (deep) conversations that will come later.

How to do it:

- ◆ Be interested in the other person – who they are, what is important to them, what they like to do – at work, in the community and in their leisure time
- ◆ Look for things/interests/areas you have in common
- ◆ Be open to sharing and talking about your own background
- ◆ Be open and non-judgmental about their strengths and weaknesses
- ◆ Be thoughtful in how feedback is provided so as not to harm the relationship
- ◆ Discuss what you are hoping to gain or learn as a result of being in the mentoring program



Level 2: “How-to” Conversations

This level is all the “how-to” conversations: for example: how to get something done; how to access resources you need for living or how to research a new job target; how to become involved in building communities; how to conduct yourself in an interview for a volunteer role.

How to do it:

- ◆ The mentor will ask questions to determine what you have done in the area of question up until now – Here the mentor is looking at where you are in the process.
- ◆ The mentor and others will gather detailed and descriptive information related to the issue
- ◆ The feedback from mentors will be descriptive and oriented to providing fundamental knowledge in “how to...”
- ◆ Your mentor will often be available to you on short notice to provide “how to” tips as you make progress

Level 3: Strategic (deep) Conversations

This conversation is characterized by the mentor bringing a broad perspective to the issue – like situating a job search within the world of being a PHA and the potential for workplace issues you may face.

To have these talks, the mentee needs to feel a deep level of trust to share their goals, dreams, and vulnerabilities. This requires knowing what is truly important to you to be able to explore and discover in a “help me understand why...” as a way of learning. This is the place where feedback can be difficult to accept as it may challenge deeply held personal values, principles and beliefs. This conversation is most valuable for generating new ideas that may not have been thought of in the past.

How to do it:

- ◆ Clarify the context of past and current decisions
- ◆ Assess strengths, weaknesses, opportunities and threats
- ◆ Explore options, scenarios, new ideas
- ◆ Explore goals and dreams
- ◆ Identify new alternatives that have never been considered before
- ◆ Explore feedback to identify it’s real meaning for life planning and decision making
- ◆ Explore values, attitudes and beliefs about the self



5 Key Questions – a Technique for all Mentors

Using a simple model of good questions will help move conversations forward to taking meaningful action. These questions may be used to solve day-to-day problems as well as uncovering deeper issues that are blocking progress on goals.

1. **What do you really want to be and do?**
 - ◆ This question surfaces goals, aspirations and wishes
2. **What are you doing really well that is helping you to get to where you want to be or what you want to do?**
 - ◆ This question surfaces strengths, skills and abilities as most people will apply their natural skills to achieve their goals
 - ◆ It may be possible to identify the values that motivate the mentee to achieve their goals.
3. **What are you not doing, or not doing well, that is preventing you from making progress? Or what are you thinking, that is preventing you from making progress?**
 - ◆ This question will surface some of the real challenges that are preventing a person from making progress against the goals. These may be internal belief systems, lack of skills, challenges related to the environment or other external factors, or other weaknesses.
 - ◆ Other challenge may surface such as: not having a plan with clear steps, unclear goals, or lack of resources. The mentor and mentee can then work out ways to work toward the goals
4. **What will you do differently tomorrow to meet those challenges?**
 - ◆ The focus here is on what will you do differently. Sometimes it may take more time exploring ideas and options before a commitment to “what I will do differently tomorrow is...” takes hold. It is important for the mentor to continue to surface the roadblocks, break down the goals into manageable steps such that the mentee can commit to taking steps to move forward
 - ◆ This process helps the mentee focus on spending time on the important activities that will help achieve the goals
5. **How can I help you?**
 - ◆ With this question, mentors can match their strengths to the areas of greatest need of the mentee, and/or
 - ◆ To identify other resources needed to help the mentee make progress



The 5-Minute Mentoring Moment Technique

The 5-Minute Mentoring Moment is a way to working through a problem or a question when only a short time is available.

Step 1: Tell your mentor that you would like to have a 5-minute Mentoring Moment

“Have you got a moment to walk me through something that happened today ...”

Step 2: (The goal is) “I would like to know how...”

Step 3: (How the mentor can help) “What I need from you is... What happened was...”

Step 4: (Describe the issue or what happened) “This is where I am stuck...” “My thinking on this is...” I need you to show me how...”

Step 5: (Explore and get ideas on what to do next) “Here are some ideas to consider...”

Step 6: Summarize what you have learned

Step 7: Say thanks for something that was helpful from the conversation, practice or demonstration – this can be as simple as *“That was a help!” “That’s OK!” or “Thanks, that works...”*

Keep to 5-minute mentoring moment and you will build a trusting and reliable mentoring relationship.



Coaching Technique for Managing Conflict

This model is provided as a guideline for exploring issues that generate conflict.

Step 1: Assess the emotions of the situation

- ◆ What emotions were triggered in me (frustration, questioning, surprise, fear)?
- ◆ What emotions do I know, or, do I anticipate were being experienced by the other person?

Step 2: Think about the circumstances

- ◆ What interests or values or needs are at stake for each of us?
- ◆ What assumptions or expectations do we have about each other?
- ◆ What approaches or style would be best for resolving the situation?

Step 3: Invite the other person to discuss and develop a resolution

- ◆ Set a positive, “open” tone by acknowledging the intention to understand and resolve the situation
- ◆ Acknowledge and validate the other person – “thank you for working with me on this; I can see that it is important to you...”

Step 4: Explore the problem or issue

- ◆ Take turns exploring each other’s thoughts and feelings about the issue
- ◆ Listen and ask questions
- ◆ Identify what is at the heart of the matter
- ◆ Summarize and agree on what you understand

Step 5: Explore options and identify a mutually agreeable solution

- ◆ Be open and explore – generate several options
- ◆ Explore how to make the options work



Moods and a Technique for Moving Forward

A mood is a behaviour that others see. It is an indication of the person’s internal conversation, or a belief they have about themselves that is showing-up. A mentor can have a positive impact on shifting the mood by understanding it and asking questions that move the mood to a more workable behaviour. Ignoring the mood will not make it go away!

Mood	Belief or Judgment the person has made	Behaviour we see or experience	Questions to ask or process to work with it
Skeptical	Doubt	Questioning “Yes, but...”	“What do you need to know that is holding you back at the moment?” “How sure do you need to be, for this to satisfy you?” “How realistic...”
Resentful	Hurt	Revenge Resistance Distance Keeping score	“What can you do to be open to a different view or perspective?” “What can you do to move the relationship to one that is neutral – you don’t need to like the person – what can you do to work with them?”
Cynical	Nothing is worthy of respect Loss of belief in the self Fear of failure	Put-downs “Biting” attitude Complaining	Ask about goals – “how is this behaviour, attitude, helping you make progress on your goals?” “Is this helping or hindering you in getting what you want?” “What small step can you take today toward your goal?” “Lets take a look at some of your past successes and see what you can apply today...”
Frustrated	Hurt Efforts seem blocked Out of control	Complain a lot Lost focus “spinning” Working more	Ask about goals – “Can we break the goals down into chunks that are more attainable?” “Can we review the progress that has been made so far?” “Lets look at how realistic the goal is”



Feedback Technique

Providing feedback that results in change is a sign of effective mentoring. Mentors and mentees will be providing feedback. Sometimes feedback will be positive; sometimes feedback will be difficult, yet, constructive.

To be effective:

- ◆ Plan your comments
 - Let your mentor/mentee know what they have done well
 - State clearly the problem area
- ◆ Pick your time and place with thought – usually a private place to assure as much dignity and respect as possible
- ◆ Give the other person a little advanced warning that you want to have an important talk so they are prepared to listen
- ◆ Listen. Your colleague may have something relevant to say
- ◆ Be sure to use “yes, and....” as this acknowledges their experience; “yes, but....” cancels-out their experience
- ◆ Conclude with your colleague agreeing on a change

Feedback done poorly is damaging, done well, is powerful

What to do with Feedback

Feedback can often be difficult to receive. Feedback will frequently trigger an emotional response in the recipient. Many people will manage to hold or contain their emotional response yet it can be difficult to truly listen to the message.

When getting tough feedback triggers an emotional reaction, it is okay to ask the other person if you could take some time to think of what they are saying and continue the talk at a later time.

It is important to keep in mind that feedback belongs to behaviour and is delivered to be helpful.

Feedback is for learning and is to help you be successful.



Feedback Process

What to Do	How to Do It	What to Say
Focus on behaviour	Make it concrete Make it practical	“Let me walk you through the experience...”
Focus on the results of behavior	Be descriptive of the behaviour; Ask about desired impact vs. actual impact	“What impact were you anticipating?”
Check for understanding	Ask questions for clarification	“Help me understand what you mean by...”
Pay attention to non-verbal cues	Be attentive to tone of voice, eye contact, body movement	“I appreciate your perspective...”
Align the feedback with the coaching goals	Create links to the areas in which the person wished to have feedback	“I can see how your experience here fits with what you wanted to learn/practice...”
Reinforce feedback is about behaviour not the person, and help them move forward in learning	Highlight progress and how the feedback is resulting in greater learning	“When we started out we were...and now we are...”



Practice: Providing Positive Feedback

Positive feedback is as important as any other type of feedback and can have a powerful impact on both the giver and receiver when done well.

The most impact is felt when the feedback identifies what was done and how the other person felt as a result.

When you did/said _____ I felt ____ because _____

When you said _____ I felt _____ and what that means to me is _____

Feeling words list

Abandoned	Able	Abrasive
Accepted	Acclaimed	Accomplished
Abused	Adept	Acknowledged
Adequate	Admired	Affectionate
Agony	Afraid	Alarmed
Alive	Alone	Amazed
Abandoned	Ambivalent	Anchored
Amused	Angry	Anguished
Amazed	Annoyed	Antagonize
Antisocial	Anxiety	Appalled
Ashamed	Assured	At ease
At a loss	Astounded	At home
At peace	At peril	At risk
Attached	Attacked	Awe
Beautiful	Beaten	Beloved
Betrayed	Bitter	Blamed
Blossomed	Blown-away	Bright
Brave	Calm	Caring
Charmed	Chaotic	Clear-headed
Clued-in	Comfy	Competent
Coping	Complete	Cool
Deceived	Degraded	Despairing
Eager	Ecstatic	Elated
Eloquent	Emotional	Encouraged
Fair	Fantastic	Fearless
Generous	Graceful	Grateful
Gutsy	Happy	Heartened



Supporting People Experiencing Discomfort

The greatest transformation people experience occurs when the discomfort becomes too great and a change needs to be made. The feelings that come with the truth of the situation may take many forms: anger, resistance, hurt, rebellion, and overwhelmed, to name several.

Mentors cannot take away the hurt, no matter how much you may wish.

You can, through the trust built in your relationship, create a safe haven for the person to move through the discomfort by offering:

- ◆ Acceptance of what is
- ◆ Belief that they have the internal strength to move through it, and
- ◆ Encouragement to plan for the future

Ultimately, you create a safe way for people to take the first steps.

To deny your mentee their experience, by saying things like “you will get over it....” or “time heals...”, is dismissing it, and will only keep the mentee in denial, difficulty and other problematic places that prevent planning for the future.

To help someone move to planning for the future, and taking the first steps, you may:

- ◆ Provide encouragement
- ◆ Provide guidance
- ◆ Share information
- ◆ Clarify needs and expectations
- ◆ Share appreciation
- ◆ Be compassionate

“Anyone can give up, it's the easiest thing in the world to do. But to hold it together when everyone else would understand if you fell apart, that's true strength.” Author unknown



Being a Mentee: Tips and Techniques

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“Man can live about forty days without food, about three days without water, about eight minutes without air, but only for one second without hope.”
Author unknown

Getting to Know my Mentor

It is important for mentees to learn about the experiences and background of their mentor. Some mentors will be PHAs; others may not, yet all have significant experience within the PHA communities. Mentors bring unique perspectives and their lived experiences to the mentoring relationship. Mentors may wish to invite mentees to ask the questions listed.

Mentors please prepare to answer these questions from the Mentees.

- ◆ What has brought you to becoming a mentor within the PHA community?
- ◆ As a PHA, what have you found to be one of the most significant issues you have overcome? Why?
- ◆ How have you changed?
- ◆ What relationships have been of help to you? Why were they helpful?
- ◆ What barriers have you experienced? How did you overcome them?
- ◆ What has been your greatest learning experience as a PHA? Why?



Self Exploration – Life-Line Review and Identifying My Core Strengths

Taking the time to think through your history, knowing your needs and creating goals are important for your success.

Becoming clear on your needs may involve several steps:

1. Life Line Review
2. Identifying Core Strengths and What I Would Like to Develop
3. Values Exploration
4. Learning Style Survey
5. Identifying My Needs For The Mentoring Relationship
6. Creating Learning Goals Using SMART or Life Goals Using: A House with 4-Rooms

Step 1: Life Line Review

Draw a line across the page as a representation of your life from your earliest memory as a child until today and project into the future.

On one side of the line, mark the significant points of your life along the line – these points need to be meaningful to you and signify such things as **accomplishments** (such as getting perfect in your first spelling test, being selected for the soccer team, purchasing your first home, saving the company money, making your first sale, etc.); **disappointments** (having to move and leaving your best friend, loss of a big contract); **significant events** that impacted or shaped who you are today (marriage, divorce, getting a job in another city and having to move, becoming a PHA, moving to Canada); **important relationships** (the birth of a child, loss of a grand-parent).

On the opposite side of the line, mark the skills and abilities you used that helped you accomplish what you accomplished, or helped you manage the difficulties along the way.

Identify the people who helped you in your life journey – these people are often informal mentors and guides.

What have you learned about yourself?

Continue the trajectory (line of your life) and forecast into the future – where do you see yourself headed and identify your goals.



Step 1: Draw your lifeline here



Step 2: Identifying Core Strengths

Review your **lifeline** from Step 1; identify the strengths you have developed over your life.

Review your **work/volunteer/career history**, identify the strengths you have developed and write a statement that demonstrates how you have applied this strength in your work.

Review your **education and professional development**, identify any additional strengths you have developed and write a statement that demonstrates how you have applied this strength in your work/career.

<i>Life Strengths</i>	<i>Summary of Core Strengths Work/Volunteer/Career Strengths</i>	<i>Education & Professional Development Strengths</i>
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Step 3: Clarifying What I Would Like to Develop

Review the Lifeline again, and reflect on those areas you would like to develop

<i>To Develop</i>	<i>How can a mentor help me?</i>
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Continue in the next section on Values Exploration and Learning Style Survey, prior to establishing your goals.



Values Exploration

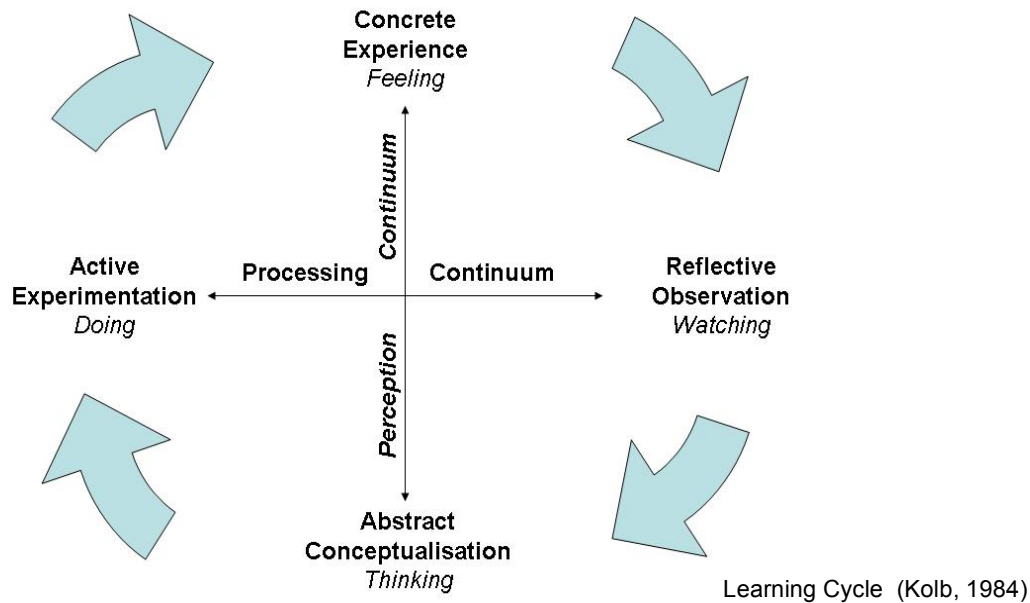
Choose the top 6-8 values that are important to you and influence your behaviour

	VALUE	DEFINITION	DESCRIBE HOW I LIVE THAT DEMONSTRATES THIS VALUE (or would like to but aren't presently)
	Consideration	Sensitive to the needs of others	
	Identification	Sense of belonging to a group, service, community	
	Tolerance	Accepting others as they are	
	Academic standing	High regard for scholastic and professional designations	
	Integrity	Honesty and standing up for one's own belief	
	Financial independence	Being informed about business conditions; being free to choose in financial/lifestyle	
	Risk	Being able to take risks	
	Routine	Having a clear idea of what is required every day	
	Variety	Having something different to do every day	
	Power	Having influence over one's own future	
	Logic	Rational, orderly objective	
	Sociability	Social interaction & companionship	
	Self-respect	Liking who you are	
	Health	Being healthy and leading a healthful lifestyle	
	Life-style	Making choices that are meaningful to you; balance	
	Recognition	Receiving recognition for accomplishments	
	Competition	Having the opportunity to compete	
	Achievement	Setting and achieving goals	
	Adventure	Trying and doing things differently	
	Personal development	Being the best you can be	
	Creativity	Thinking and acting creatively, trying new ideas	
	Independence	Freedom to make decisions	
	Trust	Believing in and supporting a relationship	
	Accountability	Being responsible for ones own behaviour	
	Others:		



Learning Style Survey

A process for building my self-awareness as an adult learner



This survey is designed to help you gain an understanding of how you learn so that you can incorporate the various learning styles in your daily learning activities. This is a tool for *learning-to-learn* will help you understand your strengths and weaknesses as a learner.

Note that like any survey of this nature, it is not 100 percent accurate, but it should help you gain some understanding of your preferred learning styles based on two continuums:

- 1) Our approach to a task – where we learn by doing or watching. This is called the **Processing Continuum**
- 2) Our response to a task – where we learn by thinking or feeling. This is called the **Perception Continuum**



Adapted from **Performance, Learning, Leadership and Knowledge**
<http://www.nwlink.com/~donclark/index.html>

Instructions

Read each statement carefully. To the left of each statement, write the code that best describes how each statement applies to you.

Answer honestly as there are no correct or incorrect answers. It is best if you do not think about each question too long,

SECTION 1

Write either "**Doing**" or "**Watching**" next to the statements below, depending upon the part of the statement you most closely relate to.

1. _____ **Doing** - I often produce off-the-cuff ideas that at first might seem silly or half-baked. **Watching** - I am thorough and methodical.
2. _____ **Doing** - I am normally the one who initiates conversations. **Watching** - I enjoy watching people.
3. _____ **Doing** - I am flexible and open-minded. **Watching** - I am careful and cautious.
4. _____ **Doing** - I like to try new and different things without too much preparation. **Watching** - I investigate a new topic or process in depth before trying it.
5. _____ **Doing** - I am happy to have a go at new things. **Watching** - I draw up lists up possible courses of actions when starting a new project.
6. _____ **Doing** - I like to get involved and to participate. **Watching** - I like to read and observe.
7. _____ **Doing** - I am loud and outgoing. **Watching** - I am quiet and somewhat shy.
8. _____ **Doing** - I make quick and bold decisions. **Watching** - I make cautious and logical decisions.
9. _____ **Doing** - I speak fast, while thinking. **Watching** - I speak slowly, after thinking.

Total number of **Doing** - _____. Total number of **Watching** - _____.

The one that has the larger number is your task preference.



SECTION 2

Write either "**Thinking**" or "**Feeling**" next to the statement below, depending upon the part of the statement you most closely relate to.

1. _____ **Thinking** - I ask probing questions when learning a new subject. **Feeling** - I am good at picking up hints and techniques from other people.
2. _____ **Thinking** - I am rational and logical. **Feeling** - I am practical and down to earth.
3. _____ **Thinking** - I plan events down to the last detail. **Feeling** - I like realistic, but flexible plans.
4. _____ **Thinking** - I like to know the right answers before trying something new. **Feeling** - I try things out by practicing to see if they work.
5. _____ **Thinking** - I analyze reports to find the basic assumptions and inconsistencies. **Feeling** - I rely upon others to give me the basic gist of reports.
6. _____ **Thinking** - I prefer working alone. **Feeling** - I enjoy working with others.
7. _____ **Thinking** - Others would describe me as serious, reserved, and formal. **Feeling** - Others would describe me as verbal, expressive, and informal.
8. _____ **Thinking** - I use facts to make decisions. **Feeling** - I use feelings to make decisions.
9. _____ **Thinking** - I am difficult to get to know. **Feeling** - I am easy to get to know.

Total number of **Thinking** - _____. Total number of **Feeling** - _____.

The one that has the larger number is your response = preference.

You will best learn by using **ALL** four styles, rather than your preferred learning style. It's recommended that you consciously incorporate various styles so that you use the full [Learning Cycle](#) (Kolb, 1984).



SCORING PROCEDURES

Each preference (high score) from the two above sections are used to determine your learning style:

If you prefer *Watching and Feeling* then you are a **Reflector (Review)**

- Prefers to learn from activities that allows watching, thinking, and to review what has happened, such as brainstorming and cooperative groups.
- Lectures may be helpful but only if they provide expert explanations and analysis.
- Likes innovative and imaginative approaches to doing things.
- Prefers to view situations from many perspectives.
- Interested in people and tends to be feeling-oriented.

If you prefer *Watching and Thinking* then you are a **Theorist (Conclude)**

- Prefers to pull a number of different observations and thoughts into an integrated whole in a step-by-step manner (go from details to big-picture).
- Prefers to reason logically and design models, theories, and projects.
- Likes lectures, analogies, systems, and case studies.
- Talking with experts is normally not helpful.

If you prefer *Doing and Thinking* then you are a **Pragmatist (Plan)**

- Prefers the practical application of ideas, solving problems, feedback, and decision-making (obvious links between the task-on-hand and a problem).
- Prefers technical problems to interpersonal issues.
- Prefers to apply new learning to actual practice to see if they work.
- Likes laboratories, fieldwork, observations, and coaching.

If you prefer *Doing and Feeling* then you are an **Activist (Do)**

- Good at adapting to changing circumstances and solves problems in an intuitive, trial-and-error manner, such as discovery learning.
- Tends to be at ease with people.
- Prefers the challenges of new experiences, involvement with others, assimilations, and role-playing.
- Likes anything new, problem solving, and small group discussions.



Goal Setting – version 1: Life Goals Using A House with 4-Rooms

- ◆ Preparing Life Goals is a personally rewarding experience that often results in a renewed sense of purpose and brings a sense of joy and peace with key decisions one must make about how life is lived.
- ◆ The following framework builds on an aboriginal view that a person is like a house with 4 rooms: spiritual, mental, physical and emotional. There must be time for reflection, goals and activities within each of these 4-rooms to live a balanced and meaningful life.
- ◆ On the next page are 10 questions to answer that will help with the reflection process.
- ◆ Once you have reflected on your 4-rooms, begin the goal setting process as outlined in the following pages.



10 Questions for Reflection

- 1) How am I perceived by my closest friend, my worst enemy?

- 2) What are the true blessings in my life?

- 3) What is my greatest talent?

- 4) When am I most naturally myself?

- 5) What is my heart's deepest desire?

- 6) What can I do to incorporate more of what I love to do, into my life?

- 7) Who are my most inspiring role models?

- 8) How can I be of service to others?

- 9) What is truly important to me?

- 10) What legacy would I like to leave?



My Spiritual Room

On this page, write your thoughts about where you are currently in looking after the spiritual side of your wellbeing, and what you would like it to be. Give thought to any gaps that are present, and decide on the steps you will take to close the gaps.

Think of yourself in terms of: fun and play, religion, community, nature, reflective time, philosophy...



My Mental Room

On this page, write your thoughts about where you are currently in looking after the mental side of your wellbeing, and what you would like it to be. Give thought to any gaps that are present, and decide on the steps you will take to close the gaps. Think of yourself in terms of: my financial life (earning wages/income), work and career, community, learning, growing, developing, education, sharing....



My Physical Room

On this page, write your thoughts about where you are currently in looking after the Physical side of your wellbeing, and what you would like it to be. At the close, give thought to any gaps that are present, and decide on the steps you will take to close the gaps.

Think of yourself in light of: physical, diet, exercise, health, living environment....



My Emotional Room

On this page, write your thoughts about where you are currently in looking after the Emotional side of your wellbeing, and what you would like it to be. Give thought to any gaps that are present, and decide on the steps you will take to close the gaps.

Think of yourself as (choose all that are relevant): father, mother, sister, brother, son, daughter, friend, partner,)



Goal Setting – Version 2: SMART Goals

In preparing to enter into a mentoring relationship, take the time to assess your strengths and learning goals. Here we provide a commonly used method for creating learning goals using the SMART process:

S – Specific – The clearer the goal and more easily understood it is for yourself and your mentor and the more likely it will be accomplished. Goals need to be broken down into specific steps or smaller goals to be successful.

M – Measurable – Goals need to be measurable so that you know you are making progress and that you have achieved them. By being measurable, the process of developing the skill or capability will be easier to define.

A – Attainable – To ensure success, goals need to be realistically attainable. Goals need to be broken down into attainable steps that will generate results in short time frames.

R- Results – State the goals in terms of the expected outcome. Outcomes can include both measurable and intrinsic outcomes.

T – Time-bound – Setting a short time line for making progress against a goal will significantly increase the likelihood of achieving the goals. A time limit provides a focus for activity.

My Goal:

Specific	
Measurable	
Attainable	
Results	
Time-bound	



Group Mentoring Tips and Techniques

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Setting The Stage for Being an Effective Member of a Mentoring Group

Participating in group-mentoring can be rewarding and challenging at the same time. To make the best of the group experience, take some time in the first meeting to establish how you wish to work together and how you will contribute to each other's learning.

Mentors facilitate group discussion on each question as a means of setting the stage for effective group functioning.

How do we want to work together in our meetings? What do we agree will be the rules of conduct for our group?

How will we organize the logistics of our group? When do we meet? How do we set an agenda?

How will we manage difficulties in our group (example: if one person dominates the conversation; if one person never talks)?

How will we celebrate our successes?



Building Relationships with the Group

The first priority is to build relationships with all members of the group. Mentors have the ability to create and maintain relationships. This ability will be a significant part of your success. There are a few key tips that will help build strong relationships:

- ◆ As the mentor, you set the tone and climate for all the meetings
- ◆ Always have an agenda for the meeting, and wrap-up with inviting mentees to prepare for the next meeting
- ◆ The best time to offer suggestions is when they requested
- ◆ You are providing perspective and alternatives – mentees make their own decisions with the information they gather from you and others
- ◆ Ask questions and stimulate discussions – you are not there to provide an “answer”
- ◆ Show you understand the mentees challenges and issues
- ◆ Provide a structure, balance formality with informality and maintain relationship boundaries that you agree to as part of the Accountability and Confidentiality Agreement process
- ◆ Be forthright and say what you mean
- ◆ Listen
- ◆ Enjoy your relationships



Tips For Facilitating Groups

The primary goal for the mentor is to assure everyone in the group benefits from the experiences of all participants. Create an open and welcoming environment.

- ◆ Create a discussion; you do not need to have the answers
- ◆ Challenge people to think about the topic at hand
- ◆ Encourage the sharing of thoughts, experiences and ideas
- ◆ Help everyone feel valued for their input
- ◆ Redirect judgments when they occur. A judgment sounds like: “You should...”; “It shouldn’t be like that...”; “If I were you, I would...”
- ◆ Ask open-ended questions and follow-up questions. “Would you describe your experience with...?”
- ◆ Bring a topic to closure with: “What will you do differently as a result of...?”; “What is the next step for you...?” “Shall we have an up-date on this topic the next time we meet?”
- ◆ Close with asking for feedback on the group process: “What worked, what did not work, what can be done differently to make the next session more effective?”



Beginning and Ending Meetings

Technique: Check-in and Check-out

Check-in:

Take 15 minutes total time at the beginning of the meeting to gain the focus of participants for the session.

This important technique acknowledges the current experience of the participants, provides a gauge to the mentor of what is top of mind, and serves as a bridge for moving people from all the activities of their day, to focus on the topics of the mentoring group.

First Meeting:

Invite each participant to introduce themselves – their background and where they are in (whatever is the focus of the group); what they see that is working for them and where they are challenged.

Incorporate any “hot-topic” into the agenda for the meeting. A hot-topic is any experience or issue that is at the top of mind of a participant.

Second and subsequent meetings:

Invite each participant to introduce themselves and ask:

“What is on your mind today?”

Check-out:

15 minutes total time at the end of the meeting to come to closure with everyone.

Ask *“what are you taking away from today’s meeting that you will use or apply in the next week?”*



Checklist – Preparing For the First Meeting

- ◆ Be prepared to discuss the backgrounds of all the participants in the group
- ◆ Review the goals of all the participants in the group
- ◆ Identify the areas that participants would like to have mentor input or possibly guest speakers to address the group
- ◆ Discuss the ground-rules of the group
- ◆ Clarify roles, responsibilities and expectations
- ◆ Discuss and sign-off on confidentiality agreements
- ◆ Agree on the amount of time you plan to spend together, where you will meet and who will initiate and organize meeting
- ◆ Set dates and times for the next meeting
- ◆ Record key issues raised by the group members and make note of any action items
- ◆ Discuss how and when you will end the relationship



Meeting Agenda

Use this agenda to keep track of your notes and mentees' topics of interest

Date Time:

Location:

Attendees confirmed:

Key Topics:

Notes:

Issues Addressed:

Next Meeting:



Mentor and Mentee Orientation to the Mentoring Program

Notes:



Worksheet: Getting to Know Each Other

The following exercise is provided to assist members of the mentee group to begin establishing a relationship with each other.

In small groups, have each individual present their background using the following questions as a guideline (allow 5 minutes per person):

What are some of the highlights of my personal life that would be useful to share, as it is part of who I am?

What are some of the highlights from my work and education history that would be useful to share as these set the foundation for the work I do?

How have mentors/guides or role models made a difference to me in my career in the past?

What are some of the hopes I have for this mentoring program?



Determine your Boundaries and Roles Within the PHA Communities

Instructions for mentoring pairs to work together (this page is repeated as page 64, in the Mentor and Mentee Orientation to the Mentoring Program section):

1. Identify the goals of your mentoring relationship
2. Discuss the various roles and relationships you each have
3. Determine if and where there are common relationships (for example: working together on a project, on a committee, as volunteers, on a Board of Directors, friends in common, social circles overlap, service user or service provider)
4. Identify all the potential risks (for example: being too friendly in a professional environment; being asked to be a reference for a selection interview; friends asking personal questions about your mentoring relationship; asking for a reference in support of a job)
5. Establish your own guidelines/boundaries for your relationship (use the Guidelines/Code of Conduct on page 18 as a reference)

Confidentiality and Accountability Agreement

We, the undersigned agree on the following terms of reference as those with which we will guide our mentoring relationship, today and beyond. We have discussed how we will manage our relationships and the ways by which we will respect each other in our group and individually.

In the spirit of partnership, we agree to collaborate on supporting each other's learning and job search within this mentorship relationship.

This will be completed by all parties in a timely manner and will form the framework for our future meetings for the duration of this professional mentoring relationship and program.

We agree to:

1. Meet regularly as outlined below
2. Respect the rules of engagement that we have established for our group
3. Provide feedback to each other to assist with each other's progress
4. Maintain confidentiality
5. Be respectful of each other
6. Other _____



Mentoring Agreement

Mentee Name	Date
Mentor Name	
Mentee Goals	
Mentor Expectations	
Mentee Expectations	
Mentor Role and Responsibility	
Mentee Role and Responsibility	
How will we deal with conflicts as they occur	
How will we bring our relationship to a close/end	
How will we meet and manage our relationship	
Mentee signature	
Mentor Signature	

References

Resources related to topics on capacity building:

1 One Foot Forward, Module 3 (Leadership), A GIPA Training Tool Kit, page 9

2 HIV/AIDS Stigma, Denial, Fear and Discrimination: Experiences and Responses of People From African and Caribbean Communities in Toronto, A Research Report available at: http://www.accho.ca/pdf/hiv_stigma_report.pdf

3 Learning Styles Adapted from **Performance, Learning, Leadership and Knowledge**
<http://www.nwlink.com/~donclark/index.html>

Websites:

CAAT website: www.hivimmigration.ca

OAN website: www.ontarioaidsnetwork.on.ca

ABPO website: www.abpo.org/

Resources for Mentoring:

Allen, T.D., Day, R., & Lentz, E. (2005). The Role of Interpersonal Comfort in Mentoring Relationships, *Journal of Career Development*, 31 (3), 155-169

Clutterbuck, D., Megginson, D., Garvey, B., Stokes, P., Garrett-Harris, R., *Mentoring in Action*, 2006, Kogan Page UK, ISBN 0-7494-4496-7

Clutterbuck, D., *Advanced Coaching and Mentoring Techniques*, (pre-published material 2007) UK

Daloz, L., *Mentor, Guiding the Journey of Adult Learners*, 1999, Jossey-Bass Publishers, ISBN 0-7879-04072-0

Leck, J., Orser, B., Mossop, C., An Exploration of Trust in Mentoring Relationships, *Journal of Diversity Management* 1, 2007, 1-11

Mossop, C., *Cascade to Wisdom: A Field Guide for Mentors and Cascade to Wisdom: A Field Guide for Protégés*, 2008 ISBN 978-0-9680623-1-9 and 978-0-968023-2-6 (only available through the author www.sagementors.com)

Zachary, L., *The Mentor's Guide, Facilitating Effective Learning Relationships* 2000, John Wiley & Son Inc. ISBN 0-7879-4742-3

