



# MENTORING TOOLKIT



## EXPECTATIONS, AGREEMENTS, AND TOOLS

Office of Leadership &  
Organizational Development



Office of the Provost

# UA PURPOSE, MISSION, VISION

*These serve as a foundation and guide for our work as colleagues and leaders across the institution.*

## **PURPOSE**

Working together to expand human potential, explore new horizons and enrich life for all.

## **MISSION**

We will continuously improve how we educate and innovate so we can lead the way in developing disruptive problem-solvers capable of tackling our greatest challenges.

## **VISION**

To create a world where human potential is realized and we're all working together to create solutions to big problems so that life in our communities, in Arizona and on our planet can thrive

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# UA CORE VALUES

## **INTEGRITY**

Be honest, respectful and just.

## **COMPASSION**

Choose to care.

## **EXPLORATION**

Be insatiably curious.

## **ADAPTATION**

Stay open-minded and eager for what's next.

## **INCLUSION**

Harness the power of diversity.

## **DETERMINATION**

Bear Down.



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# INTRODUCTION

The Mentoring Toolkit includes resources from best practices to support mentors and mentees throughout the mentoring experience. To add resources or for questions, contact the Office of Leadership & Organizational Development at [Leadershipcoaching@email.arizona.edu](mailto:Leadershipcoaching@email.arizona.edu) or by phone at 520.621.9561.

Developing mentoring relationships has long been a practice for academic advancement across universities. The University of Arizona colleges and departments offer both formal and informal mentoring for faculty as they grow in their academic careers. Additional resources are available at <https://diversity.arizona.edu/mentoring-resources>

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## BENEFITS & OUTCOMES OF MENTORING

- ▶ Develop supportive relationships across campus.
- ▶ Exchange information to improve capacity of institution to follow policies and procedures.
- ▶ To support ethics and integrity of leaders across campus.
- ▶ Increase knowledge, skills, and abilities of leaders.
- ▶ Broaden participant knowledge and understanding of the University.
- ▶ Equip participants with the tools necessary to perform to their highest capability within and beyond their current roles.
- ▶ Provide experienced participants with new perspectives, relationships, and growth.
- ▶ Create opportunities to meet and partner with others in different roles, departments, and types of work across the University.
- ▶ Create a culture that sees mentorship as an effective way of developing individuals and groups.
- ▶ Build on shared knowledge.
- ▶ Explore new opportunities.
- ▶ New networks and connections.
- ▶ Increased confidence.
- ▶ Raising your profile.



# STAGES OF THE MENTORING RELATIONSHIP

STAGE	DESCRIPTION
<b>BUILD THE MENTORING RELATIONSHIP</b>	<ul style="list-style-type: none"> <li>▶ Become acquainted and informally clarify common interests, shared values, and professional goals.</li> <li>▶ Establish rapport and trust with each other.</li> <li>▶ Explore ways in which you will work together.</li> <li>▶ Visualize opportunities for learning together; enjoy the process.</li> </ul>
<b>DEVELOP COMMON EXPECTATIONS</b>	<ul style="list-style-type: none"> <li>▶ Communicate and agree upon initial expectations and common procedures as a starting point.</li> <li>▶ Goals and expected outcomes of the relationship are developed together.</li> <li>▶ Discuss the importance of honest communication and the ability to raise concerns throughout the mentoring process to ensure the best possible outcome for everyone.</li> </ul>
<b>ENGAGING</b>	<ul style="list-style-type: none"> <li>▶ Over time needs are more clearly articulated and objectives are met. Professional growth takes place. New challenges are presented and achieved.</li> <li>▶ Both parties serve their maximum range of functions in their roles.</li> <li>▶ Expectations are reinforced or modified through discovery of the value of the relationship.</li> <li>▶ Satisfaction and mutual exchange are at their peak.</li> <li>▶ Mutual confidence develops between the mentor and mentee.</li> </ul>



# MENTOR EXPECTATIONS

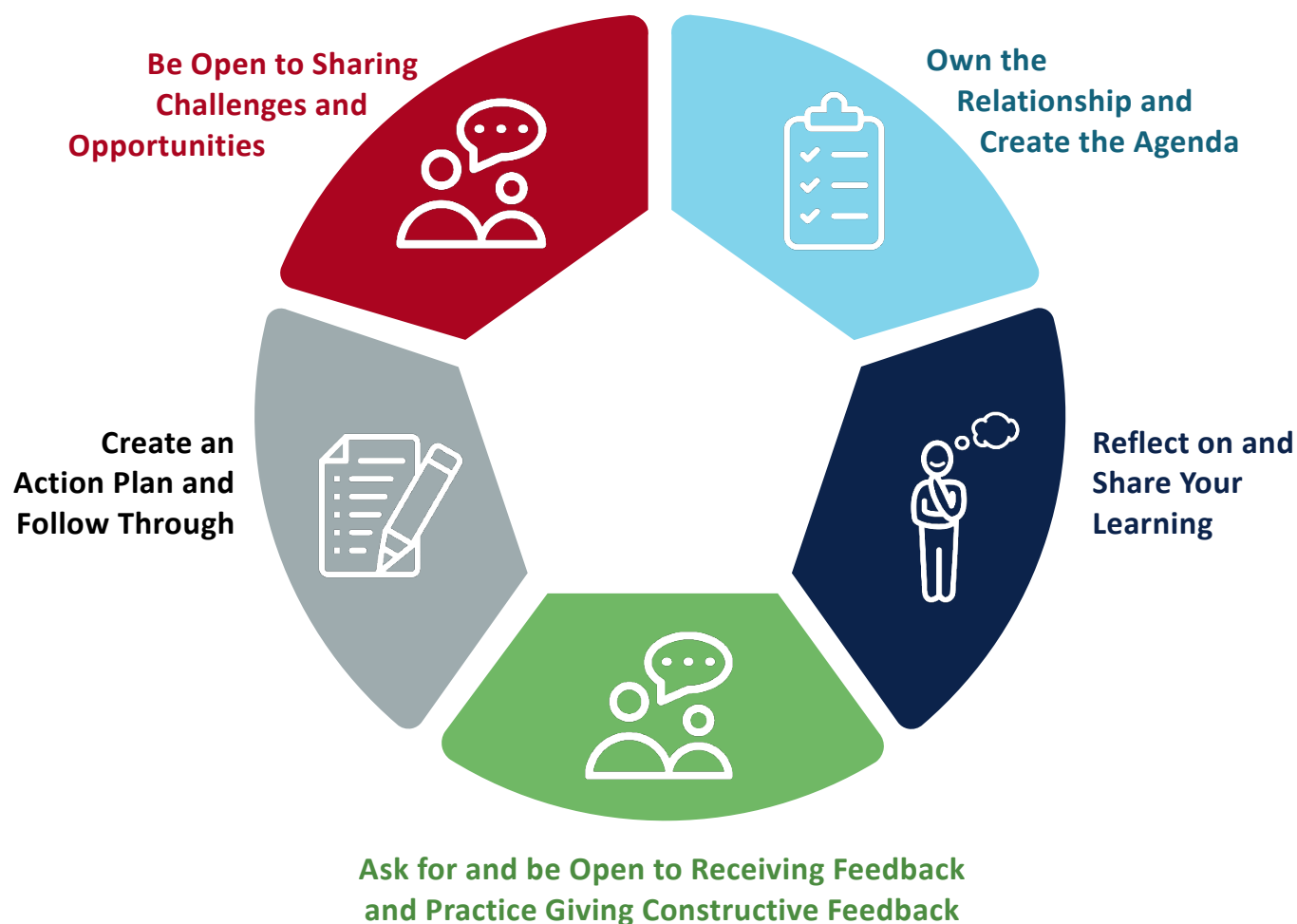


## A Mentor:

- ▶ Encourages reflection, offers observations, feedback, and guidance
- ▶ Actively listens and supports thinking through challenges and next steps
- ▶ Helps mentee clarify areas for focus, create an action plan that supports learning outcomes and growth, and builds accountability



# MENTEE EXPECTATIONS



## A **Mentee:**

- ▶ Actively participates and takes responsibility for their own professional growth and development
- ▶ Keeps commitments with their mentor
- ▶ Creates an individual action plan for development and growth
- ▶ Renegotiates the mentoring relationship when personal or professional needs change



# MENTOR – MENTEE RELATIONSHIP

## MENTOR

Call or email mentee to set up first meeting.

Share information about background and professional experiences including previous mentoring experiences, either as a mentor or mentee.

Informally clarify common interests and work values.

Help mentee clarify goals.

Set up a schedule with your mentee for regular meetings and feedback sessions. Be sure to agree on frequency and times, and stick to them.

Create a list of activities with your mentee which meet mutual goals.

Remember to both listen and talk.

Brush up on your communication and other skills and always remember to listen for understanding and take what they say seriously.

Be sensitive to gender and cross-cultural differences.

## MENTEE

Respond to your mentor's request to meet.

Share information about your background, your needs and values, and your aspirations.

Informally clarify common interests and work values.

Discuss goals to achieve your needs and aspirations.

Set goals for yourself, and follow through on them. Don't be afraid to raise your expectations or redefine your goals as part of the ongoing process.

With your mentor, decide what steps will need to be taken to achieve your goals.

Remember to both listen and talk.

Be receptive to feedback and coaching which should be thought of as opportunity for growth.

Pay attention to changes in your life that may call for updating your goals and expected outcomes.

Be prepared to discuss any concerns regarding cultural insensitivities if they occur.





# CHECKING IN

## When things go wrong, what do you do?

Acknowledge: You are right

Apologize: I am sorry

Thank: Thank you for pointing it out

Amends: Here's my plan

TED Talk: Dr. Domenech-Rodriguez: <https://www.youtube.com/watch?v=2orqr-nOIPk>

## When is safety at risk?

When it is safe, you can say anything. Stay alert to signs safety is at risk.

Silence

Stops the flow of meaning

Masking, avoiding, and withdrawing

Violence

Controlling – coercing

Labeling - dismissing people or ideas

Dismissing – belittling or threatening

## What to do when things don't feel safe

Look at content & conditions

Look for when things become crucial – where stakes are high for one or more parties

Learn to watch for safety problems

Look to see if others are moving toward silence or violence

Look for the shared interest/mutual purpose

Reflect on your own style under stress

## Watching/Listening for Signs

Physical signs

Emotional signs

Behavioral signs

How to identify signs and how to not fall into trap

Rather than focusing on “what”, identify safety issues and traps

Resource: *Crucial conversations: Tools for talking when stakes are high* by Patterson et al. (2012).



# WORKING TOGETHER

## Improving Safety

Step out, make it safe, then step back in

When respect is missing – look for signs (emotionally charged)

To restore safety

- apologize when appropriate,
- contrast – when apology isn't appropriate, context to address concern and rebuild respect

Continue to seek mutual purpose

Recognize purpose behind strategy

Invent a mutual purpose

Brainstorm new strategies

## For Reflection

Mutual purpose

Do others believe I care about their goals?

Do they trust my motives?

Examine your own motives

What do I want for me?

What do I want for others?

What do I want for the relationship?

Mutual respect

Will we be able to remain respectful?

## Great Questions to ask Your Mentee

1. What is it that you really want to do as department head?
2. What are you doing really well that is helping you get there?
3. What are you not doing well that is preventing you from getting there?
4. What will you do differently tomorrow to meet those challenges?
5. How can I help / where do you need the most help?
6. What are things you are doing that you want to quit?
7. What are things you been asked to do that you don't want to do?
8. What are things you are not doing that you want to start?
9. What are things you want to keep doing?



# CONSIDERING RACE, GENDER, CLASS, SEXUAL ORIENTATION OR DISABILITY

## Consciousness that . . .

- ▶ All individuals are cultural beings
- ▶ Power and privilege play a role in social interactions
- ▶ Context matters to understand behavior
- ▶ Underrepresented groups have key sources of social capital that contribute to their resilience
- ▶ Some work styles that work for some groups may not work the same for all.
- ▶ Provide guidance without assuming only one approach is best for all
- ▶ Sometimes it takes longer to build trust with groups that have not had positive mentors or supportive environments
- ▶ Increasing your own cultural competency and comfort can help the mentoring relationship
- ▶ Because of negative and deficit views of underrepresented groups they may be less inclined to share vulnerabilities, lack of knowledge or concerns related to their social position.
- ▶ People from underrepresented categories are often not treated as well as the dominant majority group and often experience discrimination or bias or are perceived as incompetent

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## Suggestions for coming together

- ▶ Come together on shared professional interests
- ▶ Offer information about your own experience – what did you not know? What did you have to learn the hard way?
- ▶ Be intentional with positive feedback and encouragement
- ▶ Be clear about confidentiality to address any concerns
- ▶ Key elements of trust for mentees to mentors are competence, reliability, commitment, and honesty
- ▶ Don't avoid conversations where race, gender, class, sexual orientation or disability come up
- ▶ Reach out to be a mentor to those different than you
- ▶ Make efforts to learn about each other
- ▶ Use empathy to understand each other's concerns
- ▶ Avoid stereotypes - don't assume



# 1-1 MENTORING AGREEMENT CONSIDERATIONS

## Agree on meeting days, times, length, frequency, & location

- ▶ Commit to being present
  - ▶ Clarify expectations for how you will work together
  - ▶ Identify a topic or area of focus for each meeting
  - ▶ Define the desired outcome
  - ▶ Determine follow up actions to be taken by the next meeting
  - ▶ Follow through on commitments
  - ▶ Reflect on your learning
  - ▶ Check in if you don't hear back
  - ▶ Follow up on key topics discussed
- 

## Agree on boundaries

- ▶ Keep confidentiality with information discussed within sessions (Be clear on what this means with each other so that you build an open and trusting environment)
  - ▶ Remember to listen for understanding
  - ▶ Ask for clarification when needed; don't make assumptions
  - ▶ Be present and actively participate
  - ▶ Be open to explore new or different ideas and perspectives
  - ▶ Agree as to how you will disagree
  - ▶ Be open to feedback
  - ▶ Be prepared to support each other and discuss any concerns regarding cultural insensitivities, if they occur
  - ▶ Consider how you help yourself and each other stay on track and within your time
  - ▶ Agree how you will stay accountable to meeting goals
  - ▶ Make eye contact
  - ▶ Put away your phone
- 

## Confidentiality

- ▶ Treat all information shared during mentoring sessions as confidential, unless told otherwise by the mentor or mentee.
- ▶ Mentors are required to report information required by law or University policy, such as when there is danger to self or others, or a potential violation of the University's Nondiscrimination and Anti-Harassment Policy.



# GROUP MENTORING AGREEMENT CONSIDERATIONS

## Agree on meeting days, times, frequency, & location

- ▶ Commit to being present
  - ▶ Clarify expectations for how you will work together as a group with your mentor
  - ▶ Determine group norms to ensure all participants are engaged and heard
  - ▶ Discuss peer mentoring to support each other
  - ▶ Identify a topic or area of focus for each meeting
  - ▶ Define the desired outcome
  - ▶ Determine follow up actions to be taken by the next meeting
  - ▶ Follow through on commitments
  - ▶ Reflect on your learning individually and collectively
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## Agree on boundaries

- ▶ Keep confidentiality with information discussed within sessions (Be clear on what this means with each other so that you build an open and trusting environment)
  - ▶ Remember to listen for understanding
  - ▶ Ask using the questions why, how, where, when, why (Don't make assumptions.)
  - ▶ Be present and actively participate
  - ▶ Be open to explore new or different ideas and perspectives
  - ▶ Agree to how you will disagree
  - ▶ Be open to feedback
  - ▶ Be prepared to support each other and discuss any concerns regarding cultural insensitivities if they occur
  - ▶ Consider how you help yourself and each other stay on track and within your time
  - ▶ Agree how you will stay accountable to meeting goals
  - ▶ Check in if some individuals are not engaged or discussing
  - ▶ Stop and listen if there is disagreement
  - ▶ Agree to having a facilitator who can keep the group on topic, on time, and inclusive.
  - ▶ Make eye contact
  - ▶ Put away your phone.
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## Confidentiality

- ▶ Treat all information shared during mentoring sessions as confidential, unless told otherwise by the mentor or mentee.
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# IDEAS FOR DISCUSSION

*Below are examples of Ideas for mentoring discussions. What other areas come to mind? Prior to your first meeting, think about how you want to use your time together. It may be useful to share a summary of your responses to this worksheet with your mentor at your initial meeting. As a mentor, you may think about what questions you might want to prompt discussion with your mentees.*

## **New to job, new to UA, new to role, learning to navigate the institution, etc.**

- ▶ I'm looking for help learning to navigate this environment. How are decisions made? How do all these committees work, and how do they relate? When do I have to take something to my leadership, and when should I go above my leadership? When do I make a decision, and when is it made by a committee?
- ▶ I'm new to being a manager/department head/director. I would like to have someone who knows how things work, who can be a sounding board, and provide insight.
- ▶ The culture here is different from where I came from. What advice do you have for navigating this environment?

## **Interpersonal concerns or new territory**

- ▶ I am passionate about expanding our work on diversity, inclusion, and equity, and I want to make sure my voice and message are heard. Do you have insight or feedback on how best to do this here?
- ▶ I'm having trouble engaging and collaborating with some colleagues. I thought you might have some suggestions. I want to understand more about the dynamics going on.
- ▶ I'm speaking up at meetings, but I feel like I'm not being heard. I'm looking for suggestions and some insight into what's going on.
- ▶ I have some challenging conversations coming up. I'm not sure how to approach them. Could we talk about it confidentially?

## **Build a skill**

- ▶ I would like to further develop my \_\_\_\_ skills. Could we talk about my goals and see if you perhaps could mentor me short-term, very informally?
- ▶ I'm not used to using [tool, program, etc.] the this university uses it. Do you have any advice on how to work through this?

## **Advocating for your mentee**

- ▶ Information about how to advance into academic leadership positions
- ▶ Help identifying people at the University who can be helpful to you, and how to approach them
- ▶ Help identifying people external to the University who can be helpful, and how to approach them
- ▶ Thinking through or role-playing difficult situations that you need to negotiate

## **Expand your network (fostering more relationships)**

- ▶ I'm trying to get to know people in different areas and parts of the university. [Share something about the person or their work that interested you.] Could we meet for lunch or coffee?
- ▶ I really enjoyed your presentation. I have some questions about... I would like to learn more about... Could we get together?
- ▶ I want to encourage input from a more diverse group in our department, and I am not having the response I hoped I would. Could you meet to look at what I've done and offer your thoughts?



# TIPS ON DIALOGUE

*These are some suggestions to consider when you dialogue with your mentee/mentor.*

## Effective Communication & Listening Skills

- ▶ Give full attention
- ▶ Good listening
- ▶ Constructive feedback with both criticism and praise
- ▶ Ask for type of feedback you are looking for
- ▶ Mutual expectations
- ▶ Complete/succinct in comments

## Giving Input

- ▶ Descriptive not evaluative
- ▶ Specific not general
- ▶ Focused on behavior not person
- ▶ Takes account of both receiver and give
- ▶ Focus on behavior that can be taken to change
- ▶ Solicited not impose
- ▶ Well-timed
- ▶ Sharing information – not giving advice
- ▶ Right amount not overloaded
- ▶ Focus on what is said or how not on why
- ▶ Check for communication clarity, agreement,
- ▶ Authentic to help develop trust, honesty and genuine concern

## How to Make Your In-person Meeting More Effective

- ▶ Set specific goals & timelines with benchmarks/dates
- ▶ Schedule regular time together – even if brief
- ▶ Have agenda shared in advance
- ▶ Use email for news, grants, deadline reminders, articles, encouragement
- ▶ Attend workshops, lectures, conferences together
- ▶ Share workload (reviews, authorship, etc.)

## Tips for Mentees

- ▶ Be proactive
- ▶ Relationship is an important resource
- ▶ Open to mentor suggestions – ask questions
- ▶ Practice what you learn
- ▶ Mentor map
- ▶ Eager to learn
- ▶ Respect for mentor's expertise
- ▶ Flexibility to work with mentor's schedule
- ▶ Promptness at all meetings
- ▶ Provision of feedback
- ▶ Appreciation of time and interest by mentor
- ▶ Initiate contact



# DEVELOPING AN ACTION PLAN

## IDENTIFY FOCUS AREAS



What are your strengths? What are your development opportunities?  
What are you most interested in working on? What will help you achieve your desired outcome?

## DEFINE YOUR TIMELINE



How will you turn your focus areas into specific goals? Who do you need to include in this process to clarify the goals?  
What are the actions for moving forward? What will keep you accountable?  
What is the time-line for completing your actions?

## DETAIL THE MILESTONES



What are the observable and measurable results you will see related to your goals?  
What will you and others notice in your actions and leadership that's different?  
How will you manage setbacks?  
How will you celebrate your accomplishments for achieving milestones?

## COMMUNICATION



Who will you share your plan and progress with?  
How will you monitor and report your progress?  
How will you handle a conflict or pinch?  
How will you report on act you take and milestones achieved?





# REFLECTING ON YOUR LEARNING

We ask that you take a few moments each week to reflect on what you are learning. We know you are busy, and finding time to reflect can seem unimportant or unattainable. We encourage you to be deliberate. Block time on your schedule for thinking time. Start with small increments of time and see what you learn. Make time to reflect on what you are learning – about yourself, your colleagues, your team, your supervisor, your students, or others. Notice what you are learning about yourself and others.

Become a reflective practitioner, able to be an observer of yourself and others without judgment. Practice a mindset of curiosity and explore what you notice and learn. Make notes for yourself, and share your insights and observations with your mentor.

## Questions to consider:

1. What went well?
2. What role did I play in the situation?
3. What would I change if I faced this challenge or opportunity again?
4. What am I learning about myself as department head/program chair?



# REFLECTING ON THE MENTORING RELATIONSHIP

The mentoring relationship is built on a foundation of mutual respect and trust. A positive mentoring relationship is mutually beneficial. Assessing the relationship and on a regular basis and discussing your experience allows both mentors and mentees to make adjustments to support a productive and satisfying mentoring relationship for all involved. As you work with your mentor, you will have an opportunity for check ins on how the interactions are going.

## A few questions to consider:

- ▶ What aspects of our relationship are working well?
- ▶ What would improve our mentoring relationship?
- ▶ What has been most useful?
- ▶ What has been least useful?
- ▶ Where do I see progress occurring?
- ▶ What else do I need to see or ask for?

## KEY TAKE-AWAYS

- ▶ Identify a focus for each discussion. Some examples:
  - A compelling question or concepts
  - A case study
  - An anticipated experience
  - An article shared by a mentor or a mentee
- ▶ Consider sharing areas for focus and action
- ▶ Be open and honest. Ask for what you need, solicit feedback, and share what you are learning.
- ▶ Keep confidences. It's important that you can count on each other to treat confidential information with integrity.
- ▶ Honor the commitments you make to each other (meetings, follow up, actions, etc.).
- ▶ Ask thought evoking questions and continue to be curious about each other as individuals.
- ▶ Incorporate regular check-ins to encourage real-time feedback on the mentoring experience.
- ▶ Enjoy the experience! Mentoring relationships are an opportunity to grow and learn together.



# NOTES

