

# Background Information to Mentoring

## Contents

Introduction	1
Part One – The mentee	2
Do I need a mentor?	2
Questions for the mentee to think about	2
How do I choose a mentor?	2
The mentee’s responsibilities	3
Part Two – The mentor	4
Why should I become a mentor?	4
Questions for the mentor to think about	4
What is the nature of the mentoring relationship	4
Characteristics of a good mentor	5
Pitfalls to avoid	5
The mentor’s responsibility	6
Appendix A - Stages in the Mentoring Relationship	7
Mentoring agreement.	10
Mentoring plan – template worksheet	12
Mentoring Reflections – template worksheet	13

## Introduction

This information is provided to those considering entering into a mentoring relationship to provide an understanding of the expectations and responsibilities for those in the relationship. It is general in nature and recognises that each relationship requires its own boundaries and structures.

While research suggests that the most effective mentoring relationship is one that involves a high degree of commitment and a certain degree of structure, the parties must decide for themselves how they would like to arrange the mentoring. Sometimes due to time commitments or simple preference, a relaxed approach may better suit them.

Whichever approach is adopted, it is highly recommended that the boundaries of the relationship are agreed and set out clearly before progressing. This will prevent later misunderstanding.

The NZBA has provided an outline agreement for mentors and mentees to consider when structuring their relationship. This specifies:

- the duration of the relationship;
- the key issues to be worked on;
- any boundaries or limitations;
- both parties understanding as confidentiality;
- how much structure/formality is wanted by the parties;
- the frequency of meetings and the method/location for these;
- whether agendas are required;
- concluding the relationship.

Other relevant documentation which the parties may like to consider using includes:

1. Chart of stages in the mentoring relationship;
2. Mentoring plan worksheet for identifying goals and review dates;
3. Mentoring reflections worksheet (to be used by both parties to record meetings/discussions).

It is entirely up to the parties whether they use some or all of this material. It exists to provide guidance and as memory aid when preparing for or reflecting on meetings.

## Part One – The mentee

### Do I need a mentor?

A mentor is usually more experienced person or someone with relevant expertise and experience who provides guidance and insight to their mentee. This is different from a coach, who provides more directed learning towards specific needs or situations.

If you need to learn something specific, such as how to use social media or how to develop interpersonal skills, you probably need a coach.

If you are looking for a longer-term view of your career, or need to clarify where you are heading and your options, a mentor may be your best approach.

Mentoring can also be useful at major transitional points of your career such as when you are planning to step into a new role (for example, leaving a firm and joining the bar, or considering applying for appointment as Queen's Counsel) or considering whether in fact you want to continue with your chosen path.

### Questions for the mentee to think about

The following questions define the mentee's expectations from the mentoring relationship:

- Why do you want mentoring?
- What are the top two to three key issues that you would like help with?
- How will a mentor address those?
- How do you learn best? Do you need face-to-face meetings or are you happy with written communications/Skype meetings?
- What skills and qualities do you think your mentor should possess?
- How will you evaluate the success of the relationship?

### How do I choose a mentor?

Before choosing a mentor, you need to know what you want to achieve through the mentoring relationship. There are various options including:

- getting help with overcoming a specific challenge or challenges;
- clarifying the direction to take and/or identifying the various tracks that can be followed;
- sharing unique perspectives developed from the mentor's specific experience, knowledge or wisdom;
- learning from expert knowledge in a particular area of law or practice;
- getting support at a challenging time or insight into strategies that could be used in your situation;
- getting encouragement, inspiration and motivation;
- getting validation;
- getting help with expanding networks.

Another point to consider when choosing a mentor is that you should not necessarily opt for the most senior person or the person with the best title. You are looking for someone who can help you choose your relationship goal and that maybe someone who has more time to commit or who has more recently been through the situation you are dealing with.

It is also important to consider the needs of both mentor and mentee, which may mean that it is not be possible to match you with the person you choose. Where this is the case, some other options will be suggested.

Other factors to consider are:

- mentors and mentees should not be closely associated in their work and in particular, there should not be a direct reporting line, as this can present a potential for conflict of interest;
- mentors and mentees who are too alike in terms of their personalities, work styles or philosophical views, may not actually learn a great deal from each other. Sometimes the best learning experience arises from the differences between the two parties;
- however, it is important to consider if there are factors that may lead to conflict such as completely different personalities and opposing life philosophies;
- skills and experience, geography, and availability are important. Geography can limit the potential for face-to-face meetings. This may not be a deal breaker, as there are other options such as Skype and online conferencing. However, it depends on how parties like to communicate and their comfort levels with technology. On the other hand, availability may be a real problem. If the mentor is extremely busy, and is not able to communicate promptly and regularly, then both parties should reconsider whether this will work in terms of their relationship.

## **The mentee's responsibilities**

The mentee must:

- take responsibility for their own learning;
- drive the mentoring relationship by arranging meetings and setting agendas for those meetings;
- turn up for meetings;
- ensure that any pre-meeting tasks have been completed;
- complete follow-up activities

➤ Refer to Appendix A – Stages in the relationship to ensure that you are meeting your responsibilities.

## Part Two – The mentor

### Why should I become a mentor?

There are a variety of reasons why someone might choose to be a mentor:

- it is a way of giving back to the profession;
- it is a way of developing leadership;
- it looks good on a CV or would improve your professional standing (and this is a legitimate reason to be involved);
- the mentor is a good teacher and enjoys the process of helping someone learn and/or develop.

### Questions for the mentor to think about

The following questions define the mentor's contribution to the mentoring relationship:

- What kind experience, knowledge and skills do you have?
- What personal characteristics do you have that will help develop the relationship?
- What personal characteristics do you have that will hinder the relationship?
- Are there any factors in your background that might reflect adversely on your ability to build trust and confidence with a mentee?

### What is the nature of the mentoring relationship

It is important to understand the basic nature of the mentoring relationship:

- the mentee is responsible for their own learning and while the mentor may take on a secondary sense of responsibility, he or she is not accountable in any way for the mentee's results;
- your role is that of a mentor and not a coach or a trainer. If you feel the mentee needs help with a specific aspect of their job (interpersonal skills, technology skills, knowledge of the law etc) you can help them locate suitable training, but you should not allow your relationship to become too directional by undertaking that training yourself;
- effective mentor relationships involve mutual respect. There are certain types of behaviour that encourage respect, such as turning up to meetings, listening, communicating promptly, and giving real thought and consideration to the mentee's situation.

The relationship may have several aims but some of these would be to:

- clarify career goals and suggest how they might be achieved;
- develop the mentee in specific areas such as resilience, professional marketing, leadership, working cross culturally, developing commercial acumen et cetera;
- support someone transitioning into a new role;

- provide support to those who do not have an organisational structure and line manager to support them;
- nurture or foster talent by broadening the mentee's knowledge and understanding, and to help him or her mature as a professional;
- help the mentee through a challenging period (such as returning to the work place following parental leave).

## **Characteristics of a good mentor**

A good mentor must:

1. Be an effective listener. Effective listening helps the mentee connect with the mentor as it builds rapport once the mentee senses that he or she is being listened to. It increases the ability of the parties to relax and speak naturally and understand what it is that they are looking for out of the relationship.
2. Be encouraging and trustworthy. A mentor needs to build a position of positive influence with their mentee and that can only be done where there is trust. Discuss the issue of confidentiality upfront and confirm that no part of the discussions will be shared without prior agreement. It also helps to share some information about yourself such as your background and hobbies etc. sometimes a key breakthrough can be achieved by sharing your own experiences and failures and explaining how any setbacks later affected or helped your career.
3. Maintain the focus on what the mentee wants and needs. Conduct conversations in a way that helps mentee and keep sight of the goals that have been set at the beginning of the relationship. Don't allow distractions and wandering into topics that interest you. Equally, stay flexible and creative - don't be overly rigid. It is about balance.
4. Be aware of roadblocks and barriers to progress such as a lack of knowledge in a particular area of the law, low awareness of technology, a lack of connections and relationships that establish a network of people who can link the mentee to opportunities.
5. Help the mentee grow by increasing his or her knowledge, wisdom, awareness and maturity. This may include enlarging his or her world view or broadening their perspective. This may be achieved by sharing your experiences but ultimately the mentee needs to be able to learn from their own experiences and insights.

## **Pitfalls to avoid**

There are certain pitfalls that must also be borne in mind:

- placing yourself under too much pressure in terms of time and what you think the relationship should achieve;
- having your own agenda as to what the mentee should do and positioning the relationship to achieve that result;
- being too directive or controlling;

- being disorganised and failing to set or keep appointments. Nothing is more discouraging or suggestive of a lack of engagement than someone who continually reschedules or fails to show up at the last minute;
- don't try to be impressive or inspirational. Just be yourself. You are a mentor because you have experience it is worth sharing. Equally don't think you have nothing to offer. You don't have to provide solutions, but you do have to listen and help the mentee find the right solution for their problem;
- be aware of periods when you are going to be under a lot of stress and pressure, or away for a long period. Flag these periods for your mentee as times when you may not be available. If for any reason you feel that your mentee will need support during that time, either contact the NZBA for someone who can substitute for you or see if you can arrange an informal substitute and advise the NZBA that you have done so.

### **The mentor's responsibility**

The mentor must:

- respond to meeting requests promptly and agree to the requests within the bounds of the agreed frequency of meetings.
- support the mentoring relationship by being prepared and ensuring that the goals of the relationship are at the forefront;
- ensure that any pre-meeting tasks have been completed;
- complete follow-up activities;
- Institute reviews at regular periods.

➤ Refer to Appendix A – Stages in the relationship to ensure that you are meeting your responsibilities.



## Appendix A - Stages in the Mentoring Relationship

Stage	Mentee's role	Mentor's role	Both
<b>First contact:</b>  <b>By email or phone</b>	<ul style="list-style-type: none"> <li>Exchange basic details/profiles with your mentor, including:               <ul style="list-style-type: none"> <li>contact details;</li> <li>professional background and key facts;</li> <li>what job/role you currently have etc; and</li> <li>what you want to gain from mentoring;</li> <li>check on mentor's preferred communication method.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Exchange basic details/profiles with your mentee, including:               <ul style="list-style-type: none"> <li>contact details;</li> <li>professional background and key facts;</li> <li>what job/role you currently have etc;</li> <li>why you are interested in being a mentor.</li> </ul> </li> </ul>	
<b>First meeting</b>	<ul style="list-style-type: none"> <li>Set up first meeting;</li> <li>Consider what you are currently doing, the key issues confronting you, your strengths and weaknesses;</li> <li>Consider where you want to get to.</li> </ul>	<ul style="list-style-type: none"> <li>Reflect your understanding of the purpose of the mentoring;</li> <li>Be clear and honest about what you can offer and how much time you have available;</li> <li>Identify what is happening now for the mentee and identify strengths and key issues;</li> <li>Help the mentee develop clear goal(s) and feasible outcome(s);</li> <li>Record post-meeting reflections and questions to address with mentee;</li> <li>Assign any task you want the mentee to complete before your next meeting (e.g. I want you to think about your current circumstances and identify three key features that you want to change).</li> </ul>	<ul style="list-style-type: none"> <li>Get to know each other – exchange background information</li> <li>Complete mentoring agreement either using the NZBA form or email, covering the following:               <ul style="list-style-type: none"> <li>the purpose of engaging in mentoring and clarify what you expect of each other;</li> <li>the duration of relationship;</li> <li>how structured/formal the relationship will be;</li> <li>the relationship's boundaries;</li> <li>what issues are off limits;</li> <li>how far mentor is willing to go to assist,</li> <li>confidentiality.</li> <li>meeting frequency and duration</li> <li>meeting method (e.g. Skype, in person)</li> <li>who will keep the notes and reports (if any)</li> </ul> </li> </ul>

Stage	Mentee's role	Mentor's role	Both
<b>Second meetings</b>	<ul style="list-style-type: none"> <li>Set up second meeting. Send potential agenda topics and questions to mentor;</li> <li>Finalise agenda, including feedback from mentor on topics;</li> <li>Ensure that you have completed any tasks that have been set for this meeting and review notes from last meeting.</li> </ul>	<ul style="list-style-type: none"> <li>Confirm attendance and send potential agenda topics and questions to mentee;</li> <li>Review reflection note from previous meeting;</li> <li>At the meeting, briefly outlined the relationship has agreed, the goal and the task review any assignments/tasks;</li> <li>set any new task/assignment (e.g. until we meet again, practise asking clarifying questions of clients that are more open-ended to ensure that you are getting all the information you actually need. Keep a record of the times that this has worked successfully for you).</li> </ul>	<ul style="list-style-type: none"> <li>post meeting, note reflections and any topics/questions that were not addressed</li> </ul>
<b>Subsequent meetings</b>	<p>Set up meeting</p> <p>Set up agenda</p> <p>Reflect on what has been happening and summarise this</p>	<p>Respond promptly to meeting requests;</p> <p>Suggest agenda items;</p> <p>Review notes from previous meetings and consider progress in terms of meeting goals.</p>	<ul style="list-style-type: none"> <li>continue to consolidate relationship;</li> <li>remain focussed on what you need to achieve but allow for changes in perspective as to what this might be as the relationship progresses.</li> </ul>
<b>Review</b>			<ul style="list-style-type: none"> <li>Consider the progress of the relationship, including: <ul style="list-style-type: none"> <li>have circumstances changed for either the mentee or mentor (eg: new job or role)?</li> <li>Do both parties feel that there has been progress?</li> <li>Are the meetings still of value or are they of diminishing value? Have you reached an agreed time limit for the relationship?</li> <li>Where is the mentee now in relation to his or her stated goals?</li> <li>Do the goals need to be refined?</li> <li>Agree a schedule to complete.</li> </ul> </li> </ul>

Stage	Mentee's role	Mentor's role	Both
<b>Concluding the relationship</b>	<ul style="list-style-type: none"> <li>Summarise what you have learnt and how you have applied this;</li> <li>Identify any matters that have not been addressed and consider what support you will need in future to address these issues;</li> <li>Thank the mentor.</li> </ul>	<ul style="list-style-type: none"> <li>Summarise the relationship in terms of where the mentee was before the relationship began and what has changed;</li> <li>Suggest any future actions;</li> <li>Identify ways in which being a mentor has helped you.</li> </ul>	<ul style="list-style-type: none"> <li>Identify the main themes or learning from the relationship – what are the key lessons that the mentee will remember?</li> <li>Exchange feedback on what worked well during the relationship and what could have been done better;</li> <li>Identify ongoing support options for the mentee if necessary;</li> <li>Decide whether you would like any future contact, and what form this contact should take.</li> </ul>
<b>Reporting Back</b>			<p>Both parties are encouraged to report the conclusion of their relations to the NZBA and why it has ceased. However, they are asked to remember their commitment to confidentiality and to only do so in general terms.</p> <p>Both parties are reminded that they have the option of concluding the relationship at any time on a “no blame” basis.</p>





**Mentoring plan – template worksheet**

Goal	Strategies	Resources required	Review Date	Achieved Date

**Mentoring Reflections – template worksheet**

Date of Meeting	Discussion points	Reflections	Actions