Preparing for Mentoring Relationship

Mentors and student mentees need to prepare before their first meeting so that they have a framework for building a strong relationship and setting goals efficiently and effectively.

Review the following "to do" list and make sure you (mentor and student-mentee) are prepared to create—during your initial conversation—an agreement about how the mentoring partnership will work. Both the mentor and the student-mentee should reflect on the questions to ponder so that they can create an agreement that meets both their needs. Additional helpful questions can be found in the **Mentor and Mentee Reflection Questions worksheet**.

To Do List	Strategies for Conversation	Questions to Ponder
Take time to get to know each other.	Obtain a copy of each other's bio in advance of the conversation.	What kind of information might you exchange to get to know each other better? What points of connection have you discovered in your conversation? What else do you want to learn about each other?
Share mentoring stories.	Share your previous mentoring experiences with one another.	What did you like about your experiences that each of you would carry forward in this relationship?
Talk about both the mentee and mentor's learning and development goals.	Each person should describe their career vision, hopes and dreams, and articulate broad learning goals and the reasons why they are important.	Why does your mentee/mentor want to engage in this relationship? What learning goals would align with each person's vision of the future?
Determine relationship needs and expectations.	Ask each other what he or she wants, needs, and expects out of the relationship.	Are you clear about each other's wants, needs, and expectations for this mentoring relationship?
Candidly share personal assumptions and limitations.	Talk about the mentoring assumptions and limitations you each bring to the relationship. Discuss implications for your relationship.	What assumptions do you hold about each other and your relationship? What are you each willing and capable of contributing to the relationship? What limitations do you each bring to the relationship?

Discuss learning and communication styles.	Talk about your personal styles. Use any learning style inventory that appeals to you.	How might each other's styles affect the learning that goes on in the mentoring relationship?

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

Mentoring Agreement: Creating Shared Understanding

Mentoring Ground Rules

Dimension	Approach
Time	**Our meeting will begin and end on time.** **We will manage our time efficiently.** **We will put interruptions aside.**
Role Expectation	**We will engage in active participation.** **We will honor and respect expertise and experiences.**
Communication	**Our communication will be open, candid, and direct.** **We will respect our differences and learn from each other.** **We will address issues as they come up.**
Feedback	**We will engage in giving and receiving feedback.**
Closure	**In the event that our mentoring relationship does not work, we will have a closure conversation.**

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)

Instructions: During your first meeting, after you have shared your preparatory work, move into the phase of negotiation. Establish a shared understanding of how you will work together. Use the following framework to guide the discussion and note the agreements you make so it is clear how the partnership will operate.

Goals:
- Share expectations and goals.
- Identify specific learning goals that each person wants to achieve during the mentoring relationship.
- Identify the process or steps for achieving those goals.
- Identify the criteria for evaluating successful accomplishment of the learning goals.
- Identify how successful completion of the goals will be celebrated.
- Evaluate the goals.

Mentor Role:
- Be a positive, professional role model

- Assist the student mentee in deciding which issues are appropriate to be addressed during the mentoring relationship and which should be referred to another person
- Introduce the student mentee to others; assist mentee in developing professional networks
- Guide the student mentee in developing skills of reflection and learning from experience
- Challenge assumptions and the status quo
- Provide constructive feedback when asked
- Encourage independent decision making
- Assist the student mentee to set professional career goals
- Provide a listening ear
- Help student mentee identify potential personal and professional development opportunities
- Be aware of personal values/beliefs and ensure these are not imposed on student mentee
- Support, encourage and inspire the student mentee
- Help problem solve and identify potential solutions and relevant resources
- Be empathetic
- We encourage mentors to understand the updated NCLEX exam and current data before discussing with the students

Student-Mentee Role:
- Bring forth professional and career issues for discussion
- Make own decisions
- Be prepared to take risks
- Look for new challenges
- Set professional goals
- Take appropriate advantage of professional development opportunities suggested by the mentor
- Share openly with the mentor
- Accept constructive criticism, use feedback wisely
- Disclose frustrations and concerns

Adopted from Maximizing Your Mentoring Relationships: Resource Guide (Susan Murphy, 2009).

Accountability:
- Decide on frequency of contact and methods (e.g., 2x/month in person, reachable in between meetings by phone, text, email, skype, etc.).
- Discuss communication styles. Do you think out loud? Do you need time to think before responding? Do you prefer face-to-face, phone, email, or some combination of those methods?
- Discuss learning styles — share any assessment (e.g., Myers-Briggs, Learning Styles Inventory, or similar information you may have).

- Discuss how each person likes to receive feedback to direct the discussion and ultimately how feedback is delivered. Refer to the Feedback Section for more information.

Confidentiality:
- Discuss and agree on confidentiality levels regarding the mentoring subject matter and the mentoring relationship. Is it okay to share information in order to enlist others' support and/or to ensure the best mentoring experience? And, is it okay to share information with others in order to resolve mentoring relationship issues?

Boundaries/ Hot Buttons/ Stumbling Blocks:
- Discuss and agree on boundaries for the relationship (e.g., meetings and calls only during work hours, after hours, at work, at home, expectations around response times to texts and emails).
- Discuss "what ifs" or stumbling blocks that might come up and identify a process for preventing them from derailing the relationship and/or setting the relationship back into motion if it has become derailed.
- Discuss hot buttons. What sets each person off? Determine a process for letting the other person know when a hot button has been pushed.
- Discuss and identify a process for how to handle hot button or other issues that may arise within the mentoring relationship. Can you raise issues face to face? When might you need to raise issues with the Mentoring Program Liaison?

Closure:
- Discuss the best-case scenario for closing the relationship.
- What would we ideally like to see happen when the mentoring relationship comes to an end?
- What can we do to help the relationship reach a positive learning conclusion?
- If the ideal isn't possible, how can we still ensure a positive learning outcome?
- Anticipate worst-case scenarios and potential obstacles.
- What might get in the way of a positive learning conclusion?
- What might a positive learning conclusion look like under these circumstances?
- Identify the process for how you will close the mentoring relationship. Include a step in the process for reflecting on the relationship and sharing those reflections.
- Identify how you will we celebrate or mark the closure of the relationship.

Adapted from The Mentor's Guide: Facilitating Effective Learning Relationships (Lois J. Zachary, 2011)