

MENTORING HANDBOOK

University of Wisconsin-Extension Department of Family Development

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Reviewed July, 2009 by Vice Chairs: Lori Zierl, chair, Bev Baker, Linda Bruce, Karen Dickrell, Kathy Metzenbauer, Jane Schaaf

To be used with:

- 1) Appendix H “Mentoring Guidelines”
<http://www.uwex.edu/ces/flp/department/documents/MentoringGuidelinesAppendixH.pdf> and
- 2) Appendix B “Guidelines for UW-Extension Department of Family Development Peer Review (including Annual Reviews) for Probationary Faculty” at
<http://www.uwex.edu/ces/flp/department/documents/AppendixB.pdf>

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Mentor Guidelines and Resources

SOURCE: Adapted from Chapter 2 of the Mentor Program Handbook – UWEX, Department of Community Resource Development

According to DFD Bylaws, Appendix H, “In consultation with the district director, state liaison, and department chair, the district vice chair will appoint a mentor at the time of hire for all probationary faculty members. This limited term appointment shall remain in place for one year or until the mentee has identified a mentoring team of 2-3 mentors which may or may not include the assigned mentor at the mentee’s discretion. The probationary faculty member will contact the department chair with the names of faculty mentoring team members and designated leader by the end of the first year of their tenure timeline.”

Who should be a mentor? A mentee?

The relationship between a mentor team and mentee is primarily one of sharing ideas and information. It cannot be influenced by rank or power, which may disrupt the freedom the mentee, needs to ask candid questions and challenge the existing system.

Thus, the first criterion for a mentor team is:

- the mentor team members should be outside the mentee’s chain of command; specifically not the person who conducts the new employee's performance appraisal.

Mincemoyer and Thomson (1998) found that a good mentor meets six additional criteria:

- has programmatic responsibility similar to that of the mentee. All of the mentors and mentees in their study considered having similar program background and assignments a positive factor to a successful dialogue. Although there may be situations when the mentee might benefit from a mentor with similar but different programmatic responsibilities, i.e. specialist in the mentor’s major area of programming, university professor with subject matter expertise, or a local professional with expertise to share in the mentee’s programming area.
- is geographically proximate, is from the same region, to facilitate more frequent personal interaction. With today’s increased use of technology for communication and teaching this may be less important than in the past.
- is able to meet frequently with the new employee, about monthly seems to be a desirable minimum.
- possesses a great deal of organizational as well as program knowledge.
- is willing to share this information and can successfully initiate and sustain the relationship with the new employee.
- has a sense of self and the organization so that he or she is open to discussion without defensiveness.

Who should be a mentee? The UW-Extension Articles of Faculty Governance state that the Academic Department must provide mentoring to all probationary faculty. Therefore, all non-tenured faculty should have a mentor or mentor team. While mentoring is often viewed as more important for faculty, the need is as broad as the position descriptions in the organization. It is proposed here that all new, permanent faculty and academic staff have a mentor team.

What mentor teams and mentees do

To learn more about mentor teams/mentee roles and responsibilities, including annual reviews, see Appendix H “Mentor Guidelines” in the Department of Family Development’s By-Laws, on the web at http://www.uwex.edu/ces/flp/department/app_pdf/apph.pdf

Mentors may wear many hats, depending on the mentee, the position, and the context--such as the program or community. The relationship between mentors and mentees is reciprocal and each may assume any or all of the following roles at some point:

- **Listener.** Active listening is the heart and soul of the relationship. The mentor team listens to the mentee to genuinely learn new ideas and to understand the mentee's background and experience. The mentor team must listen first in order to recognize the mentee's uniqueness and strengths.
- **Teacher.** Responds to questions, providing information that the mentee would take longer to learn alone.
- **Learning coach.** Assists in developing a learning strategy that creates knowledge and success. This includes helping the mentee identify areas/skills that need further development.
- **Guide.** Provides directions and sometimes leads the mentee through the organizational system and helps mentee understand how the organization works.
- **Advisor.** Offers sage advice--wisdom--on larger and often critical professional matters, such as relating to one's supervisor and developing career goals.
- **Counselor.** Helps with more-personal issues, such as balancing work and family or dealing with conflict.
- **Sponsor.** Promotes the mentee's knowledge and skills to those offices and committees that can use them. This role does not include "pulling strings" or asking favors. The mentor may stand by the mentee in critical situations.
- **Role Model.** Sets high expectations of performance and demonstrates through behaviors the values, beliefs and norms that are effective in the organization.
- **Motivator.** Understands what motivates the mentee and strives to help him or her find that source of motivation in Extension. Offers encouragement and inspiration and confronts negative behavior and attitudes.
- **Communicator.** Helps the mentee understand effective internal and external communication, including the subtleties of when and how messages are best delivered, potential sensitive areas, and communication in difficult situations.

Mentees do best when they are fully engaged in learning. Mentor teams and mentees are encouraged to identify together the goals for the mentoring relationship based on the needs and experience level of the mentee.

What mentor teams and mentees don't do

There are four essential things mentor teams don't do:

1. They don't tell the mentee what to do. They must not take over the role of the supervisor or suggest a specific course of action. Decisions about courses of action are always the responsibility of the mentee.
2. A mentor team must not demand that the mentee follow in his or her footsteps, accepting the mentor team's values, beliefs, and norms. Rather, a good mentor team recognizes each person's need to find and follow his or her own path.
3. Mentor teams don't permit the mentee to develop dependency. The mentor team must recognize signs of dependency--such as failure of the mentee to develop his or her own ideas--and use the dialogue model to open the issue to discussion and resolution.
4. Mentor teams keep the essential discussion of the relationship confidential. The mentor team may talk with the mentee's supervisor but this discussion must respect the private nature of the mentor team/mentee relationship and information shared.

Mentees and mentors have several challenges as they enter into a mentoring relationship. Mentor teams can be much more effective if they understand the mentee's leadership, communication, learning, and decision making style. As discussed above, they cannot become dependent on the mentor to make decisions for them. Also, they

cannot over use or abuse the mentor's time and goodwill. The mentee must enter into the relationship with recognition that he or she needs to be prepared so that time is used well. Once the relationship is established, a mentee must not withdraw and expect the mentor team alone to maintain the initiative. While it is expected that mentor teams will assume greater responsibility in the early months of the relationship, ideally the responsibility for a fulfilling experience will be shared equally. For some new employees there will be tendency to defer to the mentor team--in respect for age, experience, or authority--and to wait for the mentor team to take the lead. The dialogue proposed in this program requires that both mentor team and mentee take equal responsibility for making their relationship work.

Getting the dialogue going

While many potential mentoring relationships develop spontaneously, mentoring relationships that are established by a third party may need support in getting started. Some mentor teams and mentees will have an intuitive sense for how to start a dialogue, but others will benefit from more specific topics that might "break the ice." Some possible topics:

- ◆ Stories about career events, lessons, highs and lows
- ◆ Reasons for joining Extension
- ◆ Professional hopes and aspirations
- ◆ Developing a professional development plan
- ◆ Organizational structure--formal and informal
- ◆ Review of high-level policy and strategy in the organization
- ◆ Understanding one's own leadership strengths and weaknesses
- ◆ Discussing the same book or article on a key subject
- ◆ Review the mentee's job description and position activities
- ◆ Talk about a typical day
- ◆ Discuss how to balance work and family
- ◆ Discuss stress--tension, fatigue, and burnout
- ◆ Setting priorities and time management
- ◆ Delegating

Mentor team and mentee preparation

Mentor teams

Most mentor team members benefit from thoughtful preparation for their role. This is particularly true of mentoring that is outside one's discipline, gender, or ethnic background. In these cases, the quality of the dialogue must be excellent or mid-process crisis may result. Two forms of preparation are recommended:

1. Talk with past, successful mentors. Take 30 minutes to 1 hour to review mentoring with a successful past mentor. Discuss both the positive and negative aspects of mentoring. Ask for a reality check on the time and energy required and potential issues that might develop.
2. Participate in Department of Family Development/Family living Programs-sponsored mentor team/extension educator training opportunities. Become familiar with the Appendix H "Mentor Guidelines" in the Department of Family Development's By-Laws, on the web at http://www.uwex.edu/ces/flp/department/app_pdf/apph.pdf and Appendix B "Guidelines for UWEX Department of Family Development Peer Review (and Annual Review) for Probationary Faculty" on the web at http://www.uwex.edu/ces/flp/department/app_pdf/appb1.pdf

Mentees

1. Take full advantage of the orientation that your Family Living State Liaison offers you. The liaison will provide intensive orientation during the first three years and will link you to the state specialist team and the statewide programming teams.
2. Take full advantage of the First Year Appointed Mentor to better understand the mentoring process, Department of Family Development and selection of a Mentoring Team.
3. Regularly participate in Department of Family Development committees and meetings. (Members should communicate to the Department Chair when unable to attend a scheduled Department Meeting). Review all department documents. Refer especially to department documents in reference to scholarly work that is creative and intellectual, peer reviewed, shared, and valued by those for whom it is intended. Sixth, make full use of your mentor team.
4. Regularly attend District meetings in order to develop relationships with colleagues. These relationships will help to identify potential and to become more familiar with Family Living programming.

**Department of Family Development
Suggested Mentee Annual Record of Contacts
Due by January 15 to Department Chair**

Mentee's Name: _____

Mentor Team Leader's Name: _____

In the chart below, please record all contacts you have had with your assigned mentor team that focus on faculty expectations during the current calendar year. These should include, but are not limited to orientation, program development and teaching, feedback on plans of work and reports, scholarship and performance feedback. It is not necessary to include all contacts, only those that relate to faculty expectations. Feel free to use additional pages as necessary.

Date of contact	Topic Discussed	Outcomes	Contact Method
<i>(example)</i> Jan. 20, xxxx	Multi-year and annual plans of work	Revised plans based on feedback received	E-mail/phone

Mentee's Signature _____

Mentor Team Leader's Signature _____

Date Submitted _____

Documents submitted to Department Chair:

Due Date	Document	Date Submitted
January 15*	Annual Plan of Work	
January 15*	Multi-Year Plan of Work	
January 15*	Annual Accomplishment Report (Success Stories)	

Record of contacts is due to the Department Chair by January 15 of each year. It is the responsibility of mentee to submit this record.

Adapted from UWEX, Dept. of Youth Development, see <http://www.uwex.edu/ces/4h/department/mentoring.html>

Sample Agenda for Regular Meetings of Mentor Team and Mentee

- 1) Overview from Mentee on successes and concerns that have occurred since the last mentor team meeting.
- 2) Input from mentor team members
- 3) Using the Article of Faculty Governance Appendix I .B document as a guide, review the probationary faculty's:
 - a) Successful scholarship
 - b) Continuing professional development
 - c) Leadership in program development
 - d) Effective working relationships with colleagues and clientele
 - e) Contributions to the profession, department, and university
 - f) Probability of positive future contributions to the profession, department, and university.
- 4) Thinking ahead to upcoming success stories. What do you want to be able to claim as success this year? What evaluation will you need?
- 5) Mentees are encouraged to write a two page reflection piece to be reviewed at each annual mentor team meeting.
- 6) Review goals in Plan of Work
- 7) Review progress on evaluation plans.
- 8) Review progress on professional development plan
- 9) Where does Mentee need mentor team support?
- 10) Plan/goals for mentee and mentor team and date for next meeting (if feasible)

Note to Mentee: Record meeting on the Annual Record of Contacts for submission annually on January 15 to Department Chair.

Mentor Team First Year Review with Mentee

The faculty mentoring team will conduct an annual review with the probationary faculty member. This review may be conducted jointly with the program area annual review (for years 1-3) if feasible. Mentor Team should utilize DFD By-Laws Appendix B, “Guidelines for UW-Extension Department of Family Development Peer Review (including Annual Reviews) for Probationary Faculty” for planning the annual review.

While assessing the candidate’s work, the reviewer(s) should seek evidence of using these criteria:

- 1). Successful scholarship.
- 2). Continuing professional development.
- 3). Leadership in program development.
- 4). Effective working relationships with colleagues and clientele.
- 5). Contributions to the profession, department and university.
- 6). Probability of positive future contributions to the profession, department and university.

**Sample of Cover Letter for
Departmental Mentor Team Annual Reviews with Probationary
Faculty**

Date

Agent/Educator

Assistant Professor/

Family Living Educator

UW-Extension, _____ County

Address

Re: _____Mentor Team Meeting—Date

Department of Family Development, University of Wisconsin-Extension

Dear _____

Your mentor team enjoyed visiting with you for your (**fill in the blank**) annual review as a probationary faculty member within the Department of Family Development. You led us through a discussion of your work for the prior year, a review of future program plans, and a review of your professional development plan. You shared a number of materials that you've developed during the last year as supportive material for your discussion. As your mentor team, we provided guidance, support and objective evaluation to you regarding your professional development and potential for scholarly contributions to the profession.

The following are our observations and recommendations:

This document is confidential and a copy has been sent to the Chair of the Department of Family Development and will be placed in your departmental file maintained by the department chair. We will not share this document. We encourage you to consider sharing it as you may feel appropriate with other key stakeholders like your county department head, the County Extension Committee, your district director or your state liaison. The decision whether or not to share this document is yours to make.

Sincerely,

Jane Doe

Mentor Team Leader

Associate Professor/Family Living Educator

UW-Extension, _____ County

Date: _____

cc Mary Smith, Mentor Team Member, UW-Extension, _____ County,
Sarah Stuart, Department of Family Development, UW-Extension, _____ County

References

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- Zimmer, B. and K. Smith. 1992. *Successful mentoring for new agents: Dedicated mentors make the difference*. Journal of Extension 30(1) On line at: www.joe.org/joe/1992spring

For More Information

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- Mentoring Program Guide*. 1999. University of Illinois Extension, College of Agriculture. 18 pages.