Shared Leadership Learning

**MENTOR**

**ORIENTATION /**

**TRAINING**

Oct

2011

City of Charlotte

# SESSION PURPOSE / OBJECTIVES

Thank you for your willingness to share your experience by serving as a Mentor in the Shared Leadership Learning experience. This Orientation / Training session is designed to provide you with information and resources to assist you in the mentoring role.

At the end of this workshop, you will be able to:

* Describe the Shared Leadership Learning program and your role in its success
* Demonstrate skills for building and managing the mentoring relationship
* Understand the six mentoring dimensions
* Define Next Steps for you as a Mentor

**SESSION OVERVIEW**

During this session, we will cover:

* Shared Leadership Learning Overview
* Learning from Your Experiences with Mentoring
* Expectations of Mentors
* Critical Skill: Building Trust
* Conversation Starters
* Mentee Learning Activities
* Mentoring Relationship Agreement
* Your Questions
* Next Steps

**SHARED LEADERSHIP LEARNING OVERVIEW**

###### Purpose

The purpose of Shared Leadership Learning is to provide valuable support and enhance the development of employees by pairing them with members of leadership outside their work area. This experience will contribute to meeting our strategic objectives of recruiting and retaining a skilled, diverse workforce as well as promoting learning and growth.

Employees will have an opportunity to receive personal attention from someone at a higher level in the organization who is willing to share their experience in a one-to-one relationship. This shared experience will help:

1. Employees develop their professional and personal skills based on individual needs
2. Employees feel more closely integrated into the organization
3. Retain and develop future leaders
4. Provide an opportunity to develop community within the organization as people from cross KBU areas work together during this process
5. Leaders feel valued for their experience resulting in renewed energy and motivation in their work
6. Increase learning engagement for all participants

**Description**

Shared Leadership Learningis a formal mentoring experience for employees who have demonstrated the commitment to learn and grow. This process will pair Senior Leaders (CM, ACMs, KBEs, and Deputy KBEs) with employees at various levels in the organization in a formal one-to-one relationship for a period of 9 months. In addition to one-to-one meetings, periodic group meetings will be a part of the process to support both mentees and mentors participating in this learning experience. The City of Charlotte’s Leadership expectations and competencies will serve as a foundational framework for the process.

##### Selection

Participation in Shared Leadership Learning is voluntary for both Mentors and Mentees.

**Mentee Criteria**

Candidates for *Shared Leadership Learning must meet the following criteria*:

1. Mentee is able to define clearly his/her strengths and weaknesses
2. Mentee has assumed responsibility for his/her own development by making the commitment to learn and grow, has planned for the future, set realistic goals for himself/herself, shared these goals with the organization, and demonstrated the ability to meet them
3. Mentee is a proactive learner, recognizes and grasps learning opportunities, and is willing to take learning risks
4. Mentee is open to feedback and willing to do the difficult self-analysis required to change based on the learning relationship
5. Mentee has shown a tendency to assume leadership positions at their current level. May have led a project team, a citywide committee, a workgroup committee; or held a leadership position in a civic or church group
6. **Mentee does not have any performance or disciplinary issues.**
7. Mentee is willing to participate actively in the evaluation of this experience through their constructive feedback

**Mentor Criteria**

A successful mentor will be someone who:

* Is interested in being a mentor and is enthusiastic about the experience
* Is regarded as successful in the organization
* Is interested in sharing their experiences
* Is willing to commit their time
* Listens actively and effectively
* Gives constructive and positive feedback
* Appreciates the impact that race, religion, color, sex, national origin, sexual orientation, age, disability, or political affiliation have in the Workplace
* Respects the mentor/mentee discussions as confidential

**Matching Criteria**

* Mentor should be someone who has more experience and is at a higher level in the organization than the mentee
* Mentor should understand mentee’s area of work but not be directly involved in it
* Consideration will be given to mentees’ preferences as indicated in their self-assessments
* Consideration will be given to cross KBU, cross-gender and cross-racial pairing

**Selection Committee**

* Made up of members of the Steering Team and ODL
* Reviews participant application for closest match with mentor profile
* Follows matching criteria established above
* This year’s committee members are: Woodcock, Richard; Harrington, Randy; Hagemann, Robert; Brown, Cheryl L.; Shell, Gina T.; Richards, Tim; Arant-McAdoo, Deywon; Phillips, Candy; and Thomas-Massey, Kathy.

**Relationship Compatibility**

Toward the end of the first three months, mentoring pairs will be asked to evaluate the process and progress to this point, including a question assessing mentor/mentee compatibility. If at this stage the mentee wishes to change mentors, they may request this without being required to give a reason. Likewise, the mentor may request to change mentees without being required to give a reason. Every effort will be made to accommodate these requests. If an alternative match cannot be made, the mentee will be withdrawn from the experience and eligible for the next session.

**MENTORING EXPERIENCES**

REFLECTION

Think about someone who made a positive difference in your life through formal or informal mentoring:

* *What behaviors and characteristics did they display that made the mentoring relationship successful?*
* *What qualities did you bring to the relationship to make it successful?*

If you have been involved in an unsuccessful mentoring relationship:

* *What factors negatively impacted the relationship?*

*What lessons can you take away from your experiences that will enhance the chances for mentoring success?*

**EXPECTATIONS OF MENTORS**

Reflecting on the discussion we just completed, think about how your experiences (good and bad) translate to actual behaviors in this mentoring experience.

* *What specifically do you think a mentee expects of you?*
* *What specific behaviors will you demonstrate to make this a valuable experience for your mentee (and for yourself)?*

*Your mentee is eager to learn from you. They learn not only through listening to you, but by watching you…Watching you Walk the Talk…Watching you model the Leadership Competencies of our organization* ***(included in the Appendix).***

*The following are some specific expectations that mentees have of mentors. How they work depends largely on your mentee’s goals and the mentoring relationship agreement that the two of you design.*

**What Mentees Want from Mentors**

* Take the initiative in the relationship. Invite your mentee to meet with you, suggest topics to discuss. Ask them how they want to be supported.
	+ - ***Remember this is starting out as an artificial relationship and might be new to them.***
* Raise questions that help them discover their own answers.
	+ ***Rather than telling them what to do, ask questions that promote self-discovery.***
* Listening attentively and with intention. Avoid distractions such as phone calls and visitors when meeting with your mentee.
	+ ***Don’t listen with the intent to comment, but with the intent to learn. This helps to ensure that your questions and comments will be genuine.***
* Make observations or suggestions, and offer advice tentatively.
* Be open and vulnerable. Share your failures as well as your successes.
	+ ***They need to know that you are not perfect…that your success involved some hard knocks and tough lessons.***
* Avoid making judgments or issuing evaluative statements.
	+ ***Avoid assumptions and blanket statements.***
	+ ***Be specific about what you hear and observe, not your interpretation of it.***
* Ask for the mentee’s ideas. Involve them where appropriate.
* Introduce and expose your mentee within your own professional circle.
* In public, make only positive or neutral comments about your mentee.
* Don’t be afraid to end the relationship if either you or your mentee are unable to keep the terms of the agreement you establish.
* Review your mentoring relationship agreement on a regular basis (tips follow this page).

**Expectations for a Successful Mentoring Experience**

Discuss these expectations early and often in your mentoring experience. You may want to add other expectations the two of you (mentee and mentor) jointly identify.

|  |  |
| --- | --- |
| **Mentor** | **Mentee** |
| Demonstrate familiarity with City’s Leadership Expectations and Competencies. | **Commit to learning the City’s Leadership Expectations and Competencies.** |
| **Participate in training sessions in order to better understand and support program goals and processes.** | Participate in group development sessions in order to maximize program benefits. |
| In addition to honoring group meeting commitments and “regular” work commitments, make time to meet one-on-one with mentee. | **In addition to honoring group meeting commitments and “regular” work commitments, make time to meet one-on-one with mentor.** |
| **Initiate first mentoring meeting to ensure common understanding of roles, relationships, and processes.** | Take the initiative to contact mentor between scheduled meetings as needed. |
| Be respectful of each other’s time. | **Be respectful of each other’s time.** |
| **Look for opportunities to expose mentee to influential people and meaningful experiences outside his/her work area.** | Seize opportunities to meet new people and experience new situations. |
| Share formal/informal knowledge of the systems and relationships within the City. | **Ask thoughtful relevant questions; demonstrate intellectual curiosity.** |
| **Consistently make time to connect as appropriate and as agreed upon.** | Consistently make time to connect as appropriate and as agreed upon. |
| Keep confidences. | Keep confidences. |
| **Keep commitments.** | Keep commitments. |
| Provide help, serve as a learning broker, and be a sounding board. | **Commit to continuous learning.** |
| **Provide and be open to feedback. When providing feedback, be honest, yet tactful.** | Provide feedback about the mentoring relationship and be open to receiving feedback. When providing feedback, be honest, yet tactful. |
| Help to clarify the mentee’s performance goals and developmental needs. Provide advice on goals, activities, and progress. | **Ask for suggestions early in the relationship. When advice is given, listen to the mentor, apply ideas where appropriate and share the results.** |
| **Evaluate the relationship at various points (at least mid-point and ending) within the agreed-upon time period.** | Evaluate the relationship at various points (at least mid-point and ending) within the agreed-upon time period. |

**THE MENTOR ROLE**

Mentoring is a great way to pass along organizational wisdom and help less experienced employees manage their careers, navigate organizational politics and be successful.

As a Mentor, your role involves several different functions[[1]](#footnote-1), including:

* developing and managing the mentoring relationship.
* modeling values and behaviors.
* teaching / coaching Mentee.
* guiding and advising Mentee.
* facilitating Mentee growth by providing access / resources.
* challenging Mentee to move beyond comfort zones.
* inspiring and encouraging Mentee self-development.

**Phases of the mentoring relationship[[2]](#footnote-2)**

As the relationship matures, you may see opportunities to engage in different levels of interaction with your Mentee. Based on the Mentee’s readiness, the relationship may progress through phases:

|  |  |
| --- | --- |
| **Relationship Phase** | **Dimension** |
| Beginning | * Relationship – Building **Trust**
	+ Sharing/Listening
	+ Empathetic Listening
	+ Understanding/Acceptance
 |
| Early | * Informative – Providing **Advice**
	+ Learning about mentee’s career/plans/progress
	+ Providing tailored/accurate/sufficient knowledge – not platitudes
 |
| Middle | * Facilitative – **Exploring** Alternatives
	+ Exploring interests/abilities/ideas
	+ Discussing your own decisions about career/training
* Confrontive – **Challenging** Behaviors/Strategies
	+ Providing insight into unproductive behaviors and strategies
	+ Evaluating need/capacity to change
 |
| Later | * Mentor Model – **Motivating**
	+ Disclosing life experiences as a role model
	+ Personalizing the relationship
	+ Understanding risk avoidance and advising on taking risk and overcoming difficulties
* Employee Vision – Helping mentee w/**Initiative**
	+ Thinking critically about career future
	+ Realizing personal/professional potential
	+ Initiating change/negotiating transitions
 |

**DEVELOPING THE RELATIONSHIP: BUILDING TRUST**

A successful mentoring relationship is built on trust. Within the mentoring experience,

 *“…trust is the confidence… that (the other’s) intentions are good, and that there is no reason to be protective or careful…In essence…being vulnerable with one another…*

*Unfortunately, vulnerability-based trust cannot be achieved overnight. It requires shared experiences over time, multiple instances of follow-through and credibility, and an in-depth understanding of the unique attributes of team members”.*

*Patrick Lencioni, The Five Dysfunctions of a Team*

**While trust does not develop overnight, it can be accelerated. Here are a few suggestions for building trust within the relationship:**

* Model vulnerability.
	+ Take the first step – share your story with your Mentee.
	+ Be willing to share your failures as well as your successes.
* Do what you say you will do.
* Demonstrate that you care about your Mentee.
	+ Focus on your Mentee’s needs.
	+ Empathize with his / her challenges; offer reassurance and resources.
* Create an environment that encourages your Mentee’s vulnerability.
	+ Use open-ended questions and active listening to guide discoveries.
	+ Offer non-judgmental responses to Mentee statements and opinions (accept his / her right to hold different views).
	+ Use failures as learning opportunities.
	+ Provide descriptive feedback to enlighten blind spots.
	+ Honor confidentiality.

REFLECTION

**BUILDING TRUST**

***Sharing Your Story***

The goal of this activity is to practice modeling vulnerability. With a partner, share from your personal history one of the following:

* What you learned from your first job
* What you learned from your worst job
* What you learned from your worst boss

***Creating a Trusting Environment***

One hallmark of building trust is to honor your Mentee’s confidentiality. Are there circumstances that would cause you to break that confidentiality? What are they? How would you discuss the situation with your Mentee?

REFLECTION

**CONVERSATION STARTERS FOR MENTORS**

Speaking of building trust, that might be difficult when beginning with an “artificial” relationship. The best relationships tend to be organic and evolve over time. Despite that, there are ways you can establish a rapport with your mentee and build trust over time. After awhile, you may not need help talking to your mentee, but these questions might be helpful early in the relationship.

**Think about a time when you were placed in a situation where you didn’t know anyone.**

*How did you break the ice? What did you talk about?*

*Think about some conversation starters you could use to begin establishing a rapport with your mentee. What are they?*

On the following page are some examples of conversation starters.

***CONVERSATION STARTERS FOR MENTORS***

* Tell me about an accomplishment of which you are particularly proud.
* What makes you unique? What about your values, interests, competencies and skills, personal traits and style might it be helpful for me to know?
* What actions have you taken to manage your career? What assistance can I provide?
* What is your biggest challenge in trying to balance your work life and personal life?
* How do you like to receive feedback? How do you react to feedback?

Make sure that while you are asking these questions you are also sharing information about yourself. Otherwise, it will feel more like an inquisition or a job interview than a dialogue between mentee and mentor.

***Personal Information (Great for a first meeting)***

* What’s the next big thing for you? The answers you get from this question will vary depending on what the person values, their mood, their priorities, etc.
* Who has been the most important influence on your life? Why?
* What’s the last book you read?
* What’s your favorite movie / TV show?
* What do you like to do in your spare time?
* What do you like about working for the City?

***Current Events***

Discussing current events is a good way to start intellectual conversations with your mentee and show them the importance of connecting to things outside of work. It’s also a good way to reinforce the City’s goals around change readiness and our leadership expectations, such as “builds community” or “looks to the future.”

***Interesting Trivia about Charlotte***

Many of our mentees are not from Charlotte – some are recent transplants and would find this information interesting and helpful.

***Politics and Government***
Tread lightly

***"What if?" Situations***

* If you could live to be 140 years old, would you want to?
* If you had to live in a country other than the United States, where would you live and why?

**MENTORING RELATIONSHIP AGREEMENT**

**Shared Leadership Learning**

**Mentoring Relationship Agreement**

Mentee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Mentor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The overall purpose of the mentoring relationship is to provide valuable support and enhance the development of employees by pairing them with members of leadership outside their work area.

We (mentor and mentee) agree to enter into a learning relationship for a period of nine months. By entering into this agreement, the mentor recognizes his/her role as a professional role model and is expected to share advice, experience, and guidance consistent with the City of Charlotte Guiding Principles, Business Competencies, and Leadership Competencies.

 The mentee understands that the relationship is designed to meet his/her needs, but that primary responsibility for professional development, personal development, and career pathing remains the responsibility of the mentee.

In order to facilitate cooperation and avoid potential obstacles to this relationship, we (the above-named mentor and mentee) agree to the following terms:

Frequency of mentor-mentee contact (weekly, bi-weekly, monthly, etc.):

Preferred method(s) of communication (in-person is usually best, but when not possible, will you use email, voice mail, IM, etc?)

Concerns (time, workload, location, personal dynamics, etc):

Other:

We acknowledge that we have discussed this relationship and understand it to be an important developmental opportunity for both participants. **We agree to respect the other’s personal requests and to maintain confidentiality before, during, and after the mentoring period.**

We recognize that our participation in this career and professional development experience is voluntary and may require non-duty time. **We further understand that either participant may end the relationship without question or reason at any time during the agreement period.**

**Additionally, please refer to the page titled “Expectations for a Successful Mentoring Experience” for guidance on maximizing this opportunity.**

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Mentor Signature Date Mentee Signature Date

**MENTEE LEARNING ACTIVITIES**

Although there are numerous activities that you may pursue with your Mentee, it is suggested that they be targeted to meet to your Mentee’s specific goals and objectives.

Because you and your Mentee will be discussing goals during your first one-on-one meeting, you may want to discuss possible activities during this time. **It also may be helpful to ask your Mentee to prepare a personal SWOT analysis (Strengths, Weaknesses, Opportunities and Threats) to use as a basis for identifying targeted learning activities.**

Here are examples of Mentee learning activities:

* Reading and discussing relevant books / articles
* Attending seminars, workshops, or webinars
* Networking
* Attending meetings with Mentor
* Job shadowing the Mentor
* Attending professional association meetings with Mentor
* Interviewing people with expertise in the area Mentee wants to develop
* Discussing or debriefing Mentee on-the-job assignments
* Mentor observing Mentee performing on-the-job assignments and providing feedback
* (If agreeable to both) Off-the-job events or activities

**NEXT STEPS**

**Mentoring Relationship Agreement**

You and your Mentor will create a Mentoring Relationship Agreement (MRA) during your first one-on-one meeting. This agreement will define the parameters of your mentoring experience. The MRA is only a guide. You may use it or create your own.

**Optional Training and Resources**

One of the critical success factors for mentoring programs is appropriate training and support for the Mentor. ODL staff can provide additional resources, including one-to-one coaching and additional training in the essential skills such as giving feedback. **If interested, please contact an ODL staff member.**

**Group Learning**

Mentees will attend periodic group sessions to network and share learnings with other Mentees. Although Mentee participation is mandatory, Mentor attendance is usually optional. Group sessions may include an open session with the City Manager, external speakers, or a KBE panel.

One exception is CMO / KBE attendance at small group engagements. Below is a brief description of this offering:

* Luncheons will be held twice during the nine months – beginning after January 1.
* Eight mentors will each host an engagement for a group of five mentees.
	+ *For example, in January four mentors will each volunteer to host five (or six) mentees. Then, in April, another four mentors will each volunteer to host five (or six) mentees. Mentees will remain with their group.*
* Mentors rotate the host responsibility to expose Mentees to multiple Mentors.
* The Mentor’s support staff will coordinate logistics and communicate to the ODL staff.

**Program Evaluations**

ODL Staff and Shared Leadership Learning Steering Team members will be using feedback from this experience to refine the offering for successive groups. You will be asked periodically to complete an online evaluation. We need your active participation in the evaluation process through your constructive feedback.

**APPENDIX: Competencies for Leaders**

City of Charlotte expectations for Key Business Executives: **Look to the Future, Manage the Business, Develop Your People and Build Community.**

Using these expectations as a foundation, along with current research on leadership development, the following eighteen competencies were developed for city leaders. A fifth area, **Manage Self** was added as result of focus groups with mid-level managers.

###### Looks to the Future

1. **Communicates a Vision**
* Develops and communicates a compelling vision
* Can inspire others
* Can see beyond today
* Can paint credible visions of possibilities and likelihoods
* Creates a sense of common purpose and direction
* Shares vision with others

# Thinks Strategically

# Looks to the future

# Analyzes trends and anticipates future consequences

# Scans the environment

# Can create competitive and breakthrough strategies and plans

##### Manages Change

##### Welcomes change

##### Anticipates change and plans for it

##### Can comfortably handle uncertainty and ambiguity

##### Flexible; modifies plans and solutions in response to changing conditions

##### Can maintain productivity during times of change

##### Effectively manages the “people side” of change through communication and leadership

**Develops His / Her People**

# 4. Develops Employees

* Committed to lifelong learning
* Encourages development by providing employees with a rich variety of challenging assignments
* Holds development discussions with employees
* Creates a learning environment in which employees are motivated to take risks and grow
* Treats failures as opportunities for growth
* Seeks to develop leaders at all levels of the organization
* Supports equal opportunity for all employees

# 5. Motivates Others

* Can inspire others to action and get the best out of them
* Empowers others and encourages them to take ownership of their ideas and actions
* Seeks input from others
* Makes each employee feel that his/her work is important; recognizes their accomplishments
* Creates strong morale and a sense of teamwork
* Recognizes accomplishments of the team

# 6. Provides Feedback

* Provides honest, direct, corrective feedback to others
* Doesn’t hold back or shade the truth
* Can present both strengths and limitations in a helpful manner
* Sets clear standards and lets people know where they stand
* Faces up to people problems quickly
* Is not afraid to take negative actions when needed
1. **Hires and Utilizes the Talents of a Diverse Workforce**
* Recognizes the importance of hiring a diverse workforce that is reflective of the community
* Creates an environment in which diversity is valued and respected
* Knows what is needed in the job and finds the right people to do it

**Builds Community**

**8. Builds Partnerships – Internally and Externally**

* Knows the demographics of the community
* Knows the diverse cultural values of the community
* Identifies stakeholders
* Listens to stakeholders’ ideas and needs, and finds ways to implement the wanted changes
* Communicates and meets with stakeholders
* Regularly involves stakeholders as partners in identifying problems and in generating and implementing solutions

**9. Builds Collaboration – Internally and Externally**

* Works effectively across Key Business Unit lines
* Looks for win/win solutions
* Can see multiple points of view and options
* Can find common ground and get consensus
* Can hammer out agreements and settle disputes equitably
* Does not shy away from conflict
* Views conflicts as opportunities for improvement

**Manages the Business**

# 10. Understands the Political Environment

* Understands the City as a political organization and how it functions
* Effectively works with council on sensitive issues
* Anticipates problem areas and plans his/her approach accordingly
* Views politics as a necessary part of organizational life and works effectively within that reality

# 11. Sets Priorities

* Identifies critical priorities and spends time on what’s important
* Creates focus for KBU
* Aligns KBU priorities with organizational priorities (including vision, mission, core values, and Council Focus Areas)

**12. Thinks and Acts Competitively**

* Knows the business of his/her KBU, including the best practices, technologies and trends/future direction of the business
* Knows the competition
* Applies this knowledge to the effective management of his/her business
* Measures business results
* Is accountable financially

# 13. Focuses on the Customer

* Understands the diversity of customers being served
* Strives to meet the expectations of internal and external customers
* Seeks direct customer feedback and uses it to improve products and services
* Establishes effective customer relationships
* Ensures employees are skilled in delivering exceptional customer service

**14. Is Resourceful**

* Knows how to accomplish tasks through formal and informal channels
* Is knowledgeable about how the organization works, understands and adheresto key policies, practices and procedures
* Can collaborate effectively with management and other KBUs
* Can get tasks accomplished despite resistance

# Manages the Business (cont)

# 15. Solves Problems Creatively

* Thinks outside the box
* Challenges the status quo
* Encourages employees to experiment, take risks and try new solutions
* Seeks input from others
* Looks beyond the obvious and doesn’t take the first or easiest solution
* Asks good questions
* Sees underlying causes, patterns and hidden problems
* Improves processes rather than just fixing immediate problems

# 16. Makes Good Decisions

* Makes good decisions based on analysis and judgment
* Most decisions are proved sound over time
* Makes tough decisions in a timely manner
* Can make decisions under deadlines and with incomplete information
* Has a bias for action

**Manages Self**

# 17. Models Ethics and Values

* Adheres to the City’s Code of Ethics
* Adheres to the management values of trust, respect, honesty, collaboration and openness even during tough times
* Has integrity; acts in line with those values
* Is trusted and respected
* Accepts responsibility for his/her own actions
* Keeps confidences

**18. Has Self Knowledge**

* Recognizes his/her own personal strengths and weaknesses
* Knows how to use strengths
* Works to address weaknesses and compensate for them
* Is committed to improving himself/herself
1. Center for Creative Leadership e-Newsletter August 2008 [↑](#footnote-ref-1)
2. Dr. Norman Cohen, The Manager’s Pocket Guide to Effective Mentoring, HRD Press [↑](#footnote-ref-2)