

THE WAY FORWARD GUIDE TO PROVIDING SUPPORT THROUGH MENTORING

This guide will assist human resource professionals and small-medium business operators to implement a mentoring program that supports and develops female employees. It includes information about innovative alternatives to face-to-face mentoring, which enable women to receive mentoring regardless of geographic location or work rosters. It also highlights the critical role of senior support for the successful development of women.

This Way Forward Guide has been written and developed by the Australian Mines and Metals Association (AMMA) with support from the Australian Government as part of the Australian Women in Resources Alliance (AWRA) initiative.



AWRA is an industry-led initiative dedicated to helping employers attract, retain and reap the rewards of women in resources workplaces.



AWRA is driven by Australia's resource industry peak body, AMMA, and supported by the Australian Government through the National Resources Sector Workforce Strategy.

As an underrepresented source of labour, women face unique challenges in the resource, allied and related construction industries. Similarly, employers in these industries face challenges attracting female employees, and seek cost-effective strategies to retain valuable skills and minimise turnover costs.

In every organisation, a key resource exists to engage and support women; that is the wisdom and experience of existing employees.

There are a variety of ways in which an organisation can provide females with guidance and support, while also providing more senior employees – male and female – with an opportunity to develop communication and interpersonal skills.

These are:

- **Mentoring:** when a senior person *talks with* a talented woman to help her fulfil her career and life aspirations
- **Coaching:** when a senior person *talks to* a talented woman to help her address more immediate performance objectives, and
- **Sponsoring:** when an influential senior person *talks about* a talented woman in a way that shows belief in her capability and opens up opportunities for her.

This guide focuses on one-to-one mentoring and e-mentoring.

While mentoring is the topic of a large volume of academic and consulting industry literature, it does not have to be complicated. Enormous benefits can be derived from a simple program, which human resources or learning and development departments of any size can implement.

Mentoring is...

- A relationship based on conversations between a more senior/experienced person (the mentor) and a less experienced person (the mentee)
- Intended primarily to benefit the mentee by focusing on their needs and developing their skills, knowledge, confidence or understanding in order to help them succeed
- Enlightening and beneficial to the mentor as well
- Often aimed at the mentee's long-term professional and/or personal development
- Particularly effective at helping the mentee through a transition and may even lead the mentee to initiate a significant work, career or life change
- Different from coaching, which is usually more focused on performance or a specific need or task of the mentee
- Best done between two people in a line management relationship, and
- More likely to succeed if participants are provided with training, structure and support.

Program Design

When designing a mentoring program you will need to:

1. **Identify the stakeholders and establish a business case**– this will enable you to secure support for the program (see item 3).
2. **Set goals and objectives** for the program, so you can create, steer and measure its success. This guide assumes you have chosen to use a one-mentor to one-mentee model, communicating face-to-face and/or using information and communications technology (ICT).

The **design decisions** you will need to make before seeking sponsorship and support from management include:

- a. What types of employees will be mentees and what part of the organisation will they come from? Is the program open to anyone for whom a suitable mentor can be found, or will you target specific groups or individuals?
 - b. How will you source mentors for the mentees? What types of individuals will you recruit as mentors? Do you want the mentees to receive specific guidance into which HR will have input or will you allow the mentee to identify their purpose and work toward it with their mentor?
 - c. How will you match mentors and mentees? Do you want to allow the mentees to choose their mentor (or vice versa)? Do you want to maintain control of the matching?
 - d. What are your program goals and expected outcomes for mentees and mentors?
 - e. Will the mentors and mentees need to be in the same geographic location? If not, will the organisation arrange for them to meet and/or to communicate using ICT? (see next page *The Role of Technology in a Mentoring Program*).
 - f. How often and how do you expect the mentor and mentee to meet? Is this to happen during work hours?
 - g. Will you provide a forum for a community of mentees/mentors to interact in person or online? This can create opportunities for support, networking and information sharing.
 - h. What will be the relationship timeframe? Do you have expectations or goals to be reached upon completion of the program?
 - i. How will you promote the program to recruit mentees and mentors, and enthuse their managers?
 - j. How will you evaluate the program and demonstrate that the business case was realised?
 - k. Begin to design the protocols, processes and procedures for running the program (see below).
3. **Establish the business case and secure leadership support.** Remember that the mentors' and mentees' managers are key stakeholders and need to understand the benefits and support their staff's participation.

The Role of Technology in a Mentoring Program

Information and Communications Technology, or ICT, refers to technology used to process information and aid communications. ICT has two key roles to play in a mentoring program:

- 1. To set up and administer** a mentoring program, you will have to develop/collect, securely store, distribute and manipulate a potentially large volume of information. ICT is typically the most efficient and effective way to manage this, which includes:
 - Confidential profile information about mentor and mentee candidates.
 - Tools such as forms, emails, letters, announcements, surveys and other program templates.
 - Communications and records of actions generated during the administration of the program.
- 2. ICT can act as the communication medium for the relationship** between mentee and mentor (and among program participants). The terms 'e-mentoring' or 'virtual mentoring' are used to describe mentoring other than face-to-face. This typically involves a mentee and mentor communicating by phone, text, email, videophone (e.g. Skype) and other ways at a distance using ICT.

There are a number of PC and web based applications developed specifically for mentoring that carry out both of these functions, a number of which are listed below. The following are typical features of mentoring applications:

- Collecting profile data.
- Matching of mentees to a suitable mentor, be it automated, semi-automated and/or manual.
- Storing and providing participants with access to documents and tools to guide and support their mentoring journey.
- Communications between administrators and participants, between mentees and their mentors, and in some cases among all participants in the program. This is primarily undertaken by email, but can include 'chat' and voice-over-internet-protocol (VOIP)/video telephony such as Skype.

Most of these functions can be recreated using common PC software and web applications such as spreadsheets, databases, word processors, email, project management software, video and teleconferencing, and cloud or hosted computing (e.g. dropbox, google drive). You will need to consider the security and reliability of these platforms when deciding which to use.

Mentoring applications

- www.chronus.com*
- www.mentorloop.com.au
- www.triplecreekriver.com
- www.innovativementoring.net
- www.lifemoxie.com/mentoring
- www.mentorscout.com/
- www.mutualforce.com
- www.mentoringtalent.com/mentoring-software.asp
- www.sfgmentornet.com/

Tele/Video Conferencing

- www.gotowebinar.com*
- www.maestroconference.com
- Adobe Connect

NOTE: This list is NOT exhaustive, and the applications highlighted (*) were the mentoring application and teleconferencing applications used in the AWRA e-Mentoring pilot program for program administration/communication and participant training, respectively.

AWRA and AMMA do not promote any of the above applications/programs exclusively.

4. **Appoint a program manager** who can devote attention to the program. This person will need to already possess the following skills:
 - **Project management** – Able to manage planned activities and achieve them within a specified timeframe, cost, scope and quality utilising project documentation and reporting skills.
 - **People management and development** – Able to contribute to the design of program documents and tools, and assist mentors and/or mentees.
 - **Information and communications technology** – Able to operate chosen ICT or depending on size and scope of the program, enlist additional support (see *The Role of Technology in a Mentoring Program*).
5. Once the program design is finalised, develop an **implementation plan**. This includes:
 - a. Preparation and set up.
 - b. Publicising and launching the program.
 - c. Recruiting and screening participants.
 - d. Matching mentees and mentors.
 - e. Training mentees and mentors.
 - f. Introducing mentees and mentors and launching mentoring partnerships.
 - g. Carrying out the stages of the mentoring journey (see next page *A Basic Mentoring Process Roadmap*).
 - h. Keeping in touch with the participants (emails, phone calls, surveys/questionnaires etc) to:
 - Monitor progress of each relationship and of the mentoring activities/stages ongoing.
 - Gather feedback about the program to enable improvements.
 - Stimulate discussions within the program communities.
 - i. Evaluating the program and communicating the results.

A Basic Mentoring Process Roadmap

1. Preparation (pre-reading, self-assessment and reflection).
2. Establishing the relationship, building rapport and agreeing on the ground rules and expectations.
3. Doing the work. This is a cycle that may be repeated many times throughout the relationship and involves:
 - a. Exploring goals/purpose, setting the direction , clarifying or changing the goals.
 - b. Growing in the relationship, taking actions.
 - c. Challenging/questioning, providing feedback and ideas.
 - d. Checking/reviewing periodically, maintaining the relationship and the momentum.
4. Coming to a close; moving on.

Tools and Systems

Creating a well-managed mentoring program is crucial. A program that is effective and efficient enables the program manager to monitor progress, identify areas for improvement and report progress to stakeholders.

Regardless of whether mentoring pairs meet face-to-face, virtually or both, some essential systems and infrastructure are needed to support the program, including:

- Tools to support participants during the process: documents, e-books, letters, email, templates and forms. Some suggestions are provided in the Mentoring Process Tools and Templates boxes:

Stage 1: Preparation

Stage 2: Establishment

Stage 3: “The Work”

Stage 4: Closing

- A system for storing and providing participant access to program information/infrastructure.
- A system for gathering and comparing mentor and mentee profile information to support the matching process.
- A system for communicating to all participants (in groups or individually), including administering evaluation instruments (e.g. surveys).
- A system to monitor the program’s progress, cost and outputs against the plan.

As discussed in *The Role of Technology in a Mentoring Program*, there are software and web applications designed specifically for mentoring programs which include the systems listed above. However, many can be created using existing organisational software and resources.

Program Implementation

Now it’s time to run the mentoring program.

Efficient, consistent everyday operations are important to the success of any project. It will make the difference between clear expectations, motivation and successful outcomes, and confusion, apathy and disenchantment.

It is the role of the project manager to implement the program and ensure it is run according to the set plan.

Evaluate the Program

Ongoing quality improvement is a hallmark of an effective mentoring program.

Simple surveys can be used to evaluate how well the program is progressing, and where it can be improved.

Mentoring Process Tools and Templates

Stage 1: Preparation

Before meeting their mentoring partner, mentees and mentors should familiarise themselves with the program and reflect on what they bring to the partnership and what they would like to gain from it. Participants should be encouraged to enter the program with an open mind, and while they may have some ideas about what they want to achieve, be prepared to discover new ideas and directions as they interact with their partner.

Your program will benefit from having the following tools and templates to support participants:

- **Correspondence welcoming mentors and mentees (hard copy or electronic)**

This is a reference document about the program, including basic information such as its purpose, what it aims to achieve for the participants and the company, names and contact details of the project team, and key dates. This document may need to be tailored for different individuals and groups undertaking the program at different times/locations.

- **Mentor and mentee handbooks (hard copy or electronic)**

This is a reference document to give participants an overview of the program.

- **Mentor and mentee self-assessment tools (editable document or template)**

Before beginning the mentoring program, it is important for the mentor and mentee to reflect on their work goals/achievements (long- and short-term), skills and skill gaps, purpose for participation, anticipated challenges, and personal communication and problem-solving styles. Their perceptions are likely to change as their mentoring journey progresses, but this baseline will act as a useful starting point.

AWRA has a number of templates used in the AWRA e-Mentoring Program available on the website – www.amma.org.au/awra.

Mentoring Process Tools And Templates

Stage 2: Establishment

At this stage, mentors and mentees will be suitably matched (see page Matching Mentees and Mentors) and trained in how to undertake the program in order to create a successful relationship.

This is the time for the mentor and mentee to become acquainted and learn about each other's interests, values, goals and aspirations. It is critical that this period of socialising takes place to establish a rapport for candid and open discussions.

The following tools may assist mentors and mentees to develop their relationship:

- **Checklist for initial meeting (hard copy or electronic)**

This checklist can be used to prepare for the first meeting by providing the mentee and mentor with a shared expectation. The checklist will cover discussions about terms and conditions and partnership agreement (see below).

- **Getting to know one another guide (hard copy or electronic)**

This is a set of hints/tips for subjects to discuss at the initial mentor/mentee meetings.

- **Terms and conditions of participation (editable document or template)**

The AWRA e-Mentoring Program, linking mentors with mentees from organisations other than their own, had some necessary terms and conditions attached to participation. As well as the legal agreement and terms of service for the software, AWRA created the terms and conditions to ensure that participants understand appropriate ethical and professional behaviour of participants. Topics include:

- Limiting the liability of the program provider.
- Limiting the purposes of use of the process to preclude inappropriate, illegal and unethical behaviour.
- Confidentiality.
- Prohibiting exploitation of the relationship (e.g. confidential commercial information and enticement of employees).
- Freedom to terminate the relationship.
- The individual nature of the decision to participate.

Program managers are encouraged to seek legal advice when establishing similar terms and conditions.

- **Partnership agreement (editable document or template)**

It is very important that the mentor and mentee establish a clear and shared understanding of the process and the relationship. This document contains some items for the participants to complete (e.g. agreed frequency, modes of communication and expectations) and some agreements to be acknowledged.

Provide some points to start the negotiations, but also allow participants to modify some or all of the agreements. Encourage participants to acknowledge in writing that they have read, understood and accept the partnership agreement. This creates an opportunity for review and discussion/renegotiation if the relationship steers off course.

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Mentoring Process Tools And Templates

Stage 4: Closing

- **Wrapping-up the relationship (hard copy or electronic)**

Provide participants with some guidance about how to bring the structured mentoring relationship to a close. Be sure to also provide advice about how to end a relationship before the agreed timeframe (e.g. due to illness, time constraints etc).

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Mentoring Process Tools And Templates

Stage 3: The Work

Once the mentoring relationship is established and a rapport created between the mentee and mentor, the 'work' of the mentoring process—identifying goals and achieving growth, change or a result—can begin.

Depending on the length of the relationship, there is likely to be a number of goals identified and addressed. Also, in order to sustain a healthy working relationship, it is necessary for a periodic review to be built into the process.

Mentors and mentees can be supported in the process by being provided the following resources:

- **Goal setting guide (hard copy or electronic)**

This is a simple guide to help the mentee and mentor (as a guide in the process) set goals for the relationship.

- **Mentee and mentor toolkit (editable document or template)**

A toolkit of decision-making resources such as those listed under 'tools and resources' below.

AWRA has a number of templates used in the AWRA e-Mentoring Program available on the website – www.amma.org.au/awra.

Tools and resources

A variety of tools and processes are available to aid mentors and mentees to work through problems and achieve goals. These include:

- The GROW model
- Constructive Controversy
- Inductive Reasoning
- Identifying Logical Fallacies
- Failure Mode and Effects Analysis (FMEA)
- Risk Management
- Heuristic Methods/Rules of Thumb
- Means-End Analysis
- The Problem-Definition Process
- Plan-Do-Check-Act (PDCA)
- Soft Systems Methodology (SSM)
- 8D Problem-Solving Process
- Appreciative Inquiry
- The Simplex Process
- The Straw Man Concept
- Hurson's Productive Thinking Model
- The Four-Step Innovation Process
- Root Cause Analysis
- CATWOE
- 5 Whys
- The Drill Down Technique
- Cause and Effect Analysis
- The Four Frame Approach
- Interrelationship Diagrams
- Flow Charts
- Memory Aids and Checklists
- Storyboarding
- Stop-Think-Go decision-making

Matching Mentors and Mentees

During the design phase of the program, some key decisions will need to be made around the matching process.

1. Consider the criteria that will be used to match mentors and mentees. Ensure relevant information about the candidates is collected. Criteria relevant to career mentoring of women in the resource industry includes:
 - Qualifications.
 - Years of work experience – an appropriate gap in experience needs to exist between a mentor and mentee.
 - Career path/specialisations.
 - Expertise/competencies.
 - Mentoring goals/contributions – mentors may bring certain attributes to a relationship that can be matched with a mentee's goals.
 - Life experiences/situation – a mentee may be looking for guidance, for example, about achieving career progression while raising young children.

More sophisticated information can also be included such as personality type, learning styles, communication preferences and mentor ability self-assessment. Note, however, that this adds to the complexity and time taken to match.

Also consider the format of the information you gather. Rather than allowing open responses, creating checklists of items will simplify the matching process.

2. Consider if mentees will be permitted to choose their mentor or if matching will be managed by the project team? If mentees are able to choose a mentor, consider how to guide them through the selection process in order to satisfy matching criteria.
3. Consider if software (as contained in most mentoring applications – see *The Role of Technology in a Mentoring Program*) will be used to assist in matching or if pairs will be matched manually.

Training Participants²

The success of a mentoring relationship depends very much on the participants' confidence and competence in their respective roles. Training can be provided in person or online with increasing efficiency due to the versatility of ICT (see box *The Role of Technology in a Mentoring Program*).

Some organisations choose to train mentors and mentees separately, while others believe training should be undertaken together. Either way, at a minimum, training must cover:

- The definition of mentoring upon which the program is based.
- Role and responsibilities, including terms and conditions, code of conduct.
- Basic information, such as the roadmap and awareness of other learning resources available.
- How to manage the relationship, including getting help outside the relationship.
- Basic skills and competencies, including use of technology.

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Keys to a Successful Mentoring Program

- Create the right match between mentor and mentee. Effectively matching participants is important if the relationship is going to fulfill the mentee's needs and provide a development opportunity for the mentor. See page *Matching Mentors and Mentees*.
- Collect broad but relevant information about the candidates. Mentees and mentors can develop a rapport based on characteristics other than their specific job titles, experiences and aspirations.
- Understand the mentee's purpose. It is important to have an appropriate match at this fundamental level even though the mentee's goals may change during the process. Once a rapport is created, the relationship can more successfully develop.
- Provide structure and tools that will guide participants on their mentoring journey and allow them to put greater focus on the content of discussions. Consider also allowing participants to incorporate additional methods and/or tools into the process if they wish.
- Ensure participants agree to trust, confidentiality and relationship boundaries.
- Encourage participants to venture outside of their comfort zones in order to tackle problems and achieve goals.
- Promote an environment of commitment, respect, investment and gratitude between mentor and mentee.

Other Resources On This Topic

- <http://www.amma.org.au/awra/awra-knowledge-centre#Mentoring>
- D Clutterbuck and Z Hussain (eds), *Virtual Coach, Virtual Mentor*, Information Age Publishing, Inc., Charlotte NC.

References

1. D Clutterbuck, *Everyone Needs A Mentor: Fostering talent in your organization*, 4th edn, CIPD, London cited on <<http://www.horizonsunlimited.com.au>>.
2. D Clutterbuck and Z Hussain (eds), *Virtual Coach, Virtual Mentor*, Information Age Publishing, Inc., Charlotte NC.