Contents

Introduction .......................................................................................................................... 3
What is mentoring? .............................................................................................................. 3
What AIIP mentors say ....................................................................................................... 4
How the AIIP program works ............................................................................................ 4
Mentoring relationship life cycle ....................................................................................... 5
What to expect as a mentor ................................................................................................. 6
What your mentee expects ................................................................................................. 6
Getting started .................................................................................................................... 7
Feedback .............................................................................................................................. 8
Bringing closure .................................................................................................................. 8
Tools for mentors ................................................................................................................ 10
Tool 1: 10 Strategies for Mentoring Success .................................................................... 10
Tool 2: Tips from AIIP Mentors ....................................................................................... 11
Tool 3: Mentoring Partnership Accountability Checklist .................................................. 12
Tool 4: Strategies and Considerations for Initial Conversations ....................................... 13
Tool 5: Streamlined Mentoring Partnership Agreement Templates ................................... 14
Tool 6: Long Distance Mentoring Interaction Reflection .................................................. 15
Tool 7: Tips for Mentors in Providing Feedback ............................................................... 16
Tool 8: The Closure Conversation: Core Elements ............................................................. 17
Where to find more help ................................................................................................... 18
Acknowledgement .............................................................................................................. 20
Introduction

Thank you for volunteering to be an AIIP mentor. You are about to embark on an exciting professional experience. You have put in time and effort developing skills as a professional and you are now ready to share those skills with others in your field. They may be beginners, new entrants to the profession, or they may be experienced professionals expanding their skills and businesses into new areas. You may be wondering what the mentoring experience will be like for you, as well as hoping that you will fulfill your mentee’s expectations.

While each mentoring relationship is different because each person brings a different set of skills and needs to the experience, there are patterns that emerge that can provide guidance. Understanding the predictable stages through which the relationship will progress will help you guide your mentees to attain their goals. Your time as a volunteer mentor is valuable so you will want to make the best possible use of the time you choose to allocate to this effort. Having advice from experts in the mentoring field will give you practical tools leading to more effective use of your time.

This toolkit is a compilation of ideas that will be useful to you as you participate in your mentoring relationship. You will find tips and techniques for building a successful mentoring relationship and additional sources of information for you to turn to as questions arise.

What is mentoring?

Mentoring is basically about learning and most mentors involved in successful mentoring relationships find that they have learned and grown as much as the mentee.

Other definitions of mentoring are useful in thinking about the scope of the process and the way you think about the AIIP mentoring scheme.

According to The Mentoring Group website: “The broad definition is this: [A mentor is] an experienced person who goes out of his/her way to help a mentee set important life goals and develop the skills to reach them. An informal mentor provides coaching, listening, advice, sounding board reactions, or other help in an unstructured, casual manner. A formal or enhanced informal mentor agrees to an ongoing, planned partnership that focuses on helping the mentee reach specific goals over a designated period.”

Mentoring is a nurturing and educational process in which a more experienced individual teaches, encourages and counsels a less skilled or an inexperienced person. Mentors provide a long term view, a perspective of things that lie ahead for mentees. Mentors guide mentees to a vision of what is possible for them to aspire to. Mentoring is a learning partnership in which the mentor is the facilitator, and long distance mentoring, without face to face meetings (such as most of the relationships in the AIIP program) is increasingly common. With the availability of email in addition to telephone, it has never been easier to mentor over long distances.
The terms mentoring and coaching are sometimes used interchangeably, with people who use the words not being clear what the difference is. Although for our purposes the distinction does not really matter, coaching is always part of mentoring, but coaching does not always involve mentoring. In a mentoring relationship, a mentor who coaches is one who helps the mentee fill a particular knowledge gap by learning how to do things more effectively. (Zachary, *The Mentor’s Guide*, page 74.)

While the AIIP mentoring program is an informal one, mentoring experts advise that the relationship still needs to be taken seriously and some planning is necessary. Some mentors want to follow a structure, while others prefer to focus on broad principles and just “Go for it!” This toolkit will be of assistance to those seeking more structure and guidance. Those whose style and personalities are more compatible with operating within a broad framework will find guidance in *The Heart of Mentoring: Ten Proven Principles for Developing People to Their Fullest Potential* by David A. Stoddard.

Many professional organizations recognize the value of a mentoring program to the organization and to the individual members. Some of the organizations that currently offer mentoring programs or have offered in the past are SLA Competitive Intelligence Division, ALA New Members Round Table and LAMA among others, Michigan State University Extension Professional Development Program and the European Heat Pump Association, National Science Foundation.

*See: Tools for Mentors 1: 12 Strategies for Success*

**What AIIP mentors say**

“[A mentoring relationship] allows a mentor to get to know a new colleague, possibly recruit a subcontractor…”

“Mentoring keeps me on my toes as I have to think or re-examine or even brush up on things related to business. In other words, mentoring is a learning opportunity…”

“Mentoring is one of the most direct ways to give back to the profession. It does not have to take a lot of time – just answering the questions and concerns that traditionally come up during the first year of business is a tremendous help to new information professionals, and not a large time commitment for the mentor.”

*See Tools for Mentors 2: Tips from AIIP Mentors*

**How the AIIP program works**

The policies and procedures that relate to the mentoring committee can be found in Section 9, pages 23 through 25, available in PDF format of the Policies and Procedures Manual on the AIIP website at [http://www.aiip.org/PolicyProcedure](http://www.aiip.org/PolicyProcedure).
The AIIP Volunteer Mentoring Program matches experienced members with members who would like some advice and support in growing their businesses.

Mentors are Full AIIP members who have been in business for at least 3 years. They are seasoned information professionals who volunteer their time to help new members with the process of launching their business (e.g., determine an area of specialty, review a business plan, act as a sounding board for marketing strategies and tactics, give tips for finding clients) and, in general, provide sage wisdom.

The Mentor Program matches experienced AIIP members who volunteer to work with their mentees with new members who will launch a business within the next three months or members who desire the support of a mentor to change, refine or enhance their current business focus. Mentors can serve in a variety of roles, depending on the level of commitment in the mentoring relationship and the needs of the mentee. Mentors can convey to the mentee the knowledge, skills and competencies they have developed as independent information professionals. Mentors may also assist their mentees in assessing their strengths and weaknesses.

The mentor and mentee agree to work together for a year. During those 12 months, the Mentoring Committee is available to offer assistance and will contact mentors at specified intervals to ensure that the relationship is going well and is mutually beneficial for the mentor and mentee.

See: Where to find more help

Mentoring relationship life cycle

Whether you are conscious of them or not, there will be four predictable phases in every mentoring relationship, whether the relationship is formal or informal. The phases are: preparation, negotiation, implementation, and closure. Just being aware of the phases can contribute to the success of the mentoring partnership. Taking the phases for granted or thinking they can be skipped can lead to misunderstandings along the way and may damage the relationship. While the phases are predictable, the progression is not in a straight line, but in a circle that includes going back to an earlier phase before moving forward again.

The phases are:

- Preparation – mentors consider the skills they have, their personal motivation, and their readiness to function as a mentor. Mentees assess their readiness to work with a mentor and what they hope to gain from the experience.

- Negotiation – This is the time when the mentoring partners reach agreement on learning goals and define the process of the relationship. A key component is initial the conversation between the two people as they work together to form an agreement.
• Implementation – During this phase the work of the relationship is carried out. The mentor nurtures the mentee’s learning and monitors the progress towards meeting the goals.

• Closure - begin with the end in mind. Know at the beginning of the partnership that it will end. Be ready to evaluate reaching the goals that you established at the outset and celebrate the relationship.

What to expect as a mentor

After the Mentoring Committee has matched a mentor with a mentee, a virtual introduction of the mentoring pair is made by email. Newly assigned mentors receive the following PDF documents as email attachments:

• Mentoring program policies and procedures
• Mentee application process
• Mentor Request Application Form submitted by prospective mentee

Once the virtual introduction has been made, your newly assigned mentee should contact you by email within 30 days and you will be ready to begin. A bit of preparation before the first contact will create a solid beginning.

Dr. Zachary says that the key to successful long-distance mentoring is taking time to establish the human connection and develop a relationship. Building that relationship will take time and planning as well as good communication skills. The same communication skills that serve well in running an independent information professional business will contribute to a successful mentoring partnership:

• Listening
• Honoring time together
• Paying full attention, not-multi-tasking
• Preparation
• Following through
• Keeping notes to save time in the long run

See Tools for Mentors:

5: Streamlined Mentoring Partnership Agreement Template
6: Long Distance Mentoring Interaction Reflection

What your mentee expects

When asked what specific assistance they would like from an AIIP mentor, applicants have asked for support in a variety of areas related to their businesses. Here are some of the most common areas in which mentees ask for help:
Of course, satisfying information needs is only one aspect of the learning partnership. “Relationship is the glue of the mentoring partnership.” (Zachary, *The Mentor’s Guide*, page 82) In addition to meeting the needs for information, successful mentors have excellent interpersonal skills as well. To be successful, a mentor should have skills to act as a teacher and a coach, to encourage and support the mentee, to lead the mentee to challenging learning experiences, and to provide honest feedback. There must be reliability and trust between the mentoring partners, as well as confidentiality. Excellent mentors listen actively, accept mentees as they are, and expect excellence but not perfection. However, neither formal teaching nor coaching experience is required to be a successful mentor.

*See Tools for Mentors 3: Mentoring Partnership Accountability Checklist*

### Getting started

When people begin an informal mentoring relationship, they often assume things will just evolve naturally. This assumption can lead to trouble in the relationship however, since the partners may have quite different ideas about the frequency of contact, the boundaries between the partners and other aspects of the relationship. Establishing ground rules will help manage expectations for both people.

Common ground rules focus on:

- Meetings beginning and ending on time
- Degree of participation of both partners
- Mutual expectations of the relationship
- Openness of communication
- Respect for differences and differing experience and expertise
- Mutual confidentiality
- Time management
- Elimination of interruptions
- Establishing boundaries

Writing for The Mentoring Group, Dr. Linda Phillips-Jones suggests negotiating what the learning goals will be, how feedback will be handled, what is and is not confidential. She notes that showing how negotiation can work is in itself great mentoring.
Establishing boundaries is an important consideration, so take the time to discuss them. Boundaries that are too loose may be misinterpreted, yet when they are too rigid, they may stifle creativity and vision. Aspects of boundaries to discuss may include what topics are open for discussion, when the mentor will be available to the mentee and what help the mentor is prepared to give. For example, AIIP mentors are not expected to provide their mentees with subcontracting work or clients. If the conversation shifts towards personal problems or psychological needs, be prepared to return the emphasis to the partnership agreement and the mentee’s learning goals.

*See Tools for Mentors 4: Strategies and Considerations for Initial Conversations*

**Feedback**

Sometimes one or both partners in the mentoring partnership will be unfamiliar or uncomfortable with the feedback process. The process can be thought of as a circle which includes: asking for feedback, giving feedback, receiving feedback, accepting feedback, acting on feedback, and looping around again to asking for feedback.

Honest feedback is only possible in a relationship in which rapport has been established and there is a climate of trust. The mentor can make feedback a regular aspect of the relationship by making it a routine part of conversations. In *Mentoring Excellence Pocket Toolkit #2: Feedback and Facilitation*, Lois Zachary offers these tips on asking for feedback:

- Model the importance of feedback by regularly asking “How are we doing?”
- Ask about the relationship, the learning process and progress toward meeting learning goals
- Encourage the mentee to ask for specific feedback from various sources
- Model the way by asking for feedback on your feedback

To be helpful, a mentor needs to offer candid feedback. Dr. Zachary’s tips on giving feedback are:

- Be specific and descriptive
- Share your observations
- Provide examples
- Be non-judgmental
- Focus on behaviors, not personality
- Be authentic and sincere
- Balance candor with compassion
- Check for understanding and agreement

*See Tools for Mentors 7: Tips for Mentors in Providing Feedback*

**Bringing closure**
While everyone enters relationships with expectations for success, not all pairings work out. An AIIP mentoring partnership may not proceed as planned because of changes experienced by either partner, such as increased workload, unexpected personal obligations, or for a variety of other reasons. The AIIP Mentoring Committee is one of the first places for you to seek help if such a situation should arise.

Whether the relationship ends prematurely or at the anticipated time, it is beneficial to have planned from the beginning how to bring about closure.

One agreement you can make in the beginning is the establishment of a no-fault rule. Agree that neither of you will seek to assign blame if the partnership does not work out as planned. Without blame, it will be possible to talk about the positive aspect of the time you have spent together. If a final conversation proves impossible for whatever reasons, do the best you can to think through the relationship and bring closure in your own mind without assigning blame to either partner.

On the other hand, things may have gone so well that you will simply be redefining your relationship with your partner. You may have become friends or decide to have an ongoing business relationship. You will want to include a way to celebrate the success of your partnership as you move on relating on changed terms.

*See Tools for Mentors 8: The Closure Conversation: Core Elements*
Tools for mentors

Tool 1: 10 Strategies for Mentoring Success

1. Review information available to you to get to know your mentee
2. Establish a regular pattern of contact and agree on guidelines for contact in between
3. Keep focused on achieving goals and not just day-to-day challenges
4. Follow through on your commitments; hold your mentee accountable for his/her commitments
5. Be open to learning and new approaches
6. Periodically reflect on what you and your mentee are learning
7. Hold your mentee accountable for his/her growth and development
8. Provide regular feedback; seek and welcome feedback from your mentee
9. Expect to make mid-course correction
10. Bring closure and acknowledge the relationship

(Adapted from Mentoring Excellence Pocket Toolkit #1: Strategies and Checklists for Mentors by Lois Zachary, Leadership Development Services, LLC, 2007)
Tool 2: Tips from AIIP Mentors

- “Someone – whether in this business or some other – guided you through the challenges of setting up your business, focusing your goals, etc. in your early days. Pay it forward. It feels great. Most of all, it’s awesome to see the excitement and ideas that the mentee brings into the conversation and it might even help you find a new idea to focus on.”

- “Have your mentee post questions to AIIP-L to tap into the resources of the entire group and supplement your own expertise.”

- “The same skills of emotional intelligence that help with clients, will help with mentees.”

- “Having good, open conversations in the beginning helps in building a foundation for relationships – finding out about each other’s background and experience, style of teaching and learning, ensuring the person’s understanding of the program, clarifying needs and agreeing on framework.”

- “…the learning goes both ways, and I suspect that I gain as much from the relationship as the mentee does.”

- “I respond to the mentee’s needs. Each I’ve had has been quite different. I always start with a scheduled call and a list of questions about his/her goals.”
## Tool 3: Mentoring Partnership Accountability Checklist

<table>
<thead>
<tr>
<th>Rate your meetings against the criteria below</th>
<th>Never</th>
<th>Sometimes</th>
<th>Most of the time</th>
<th>Always</th>
</tr>
</thead>
<tbody>
<tr>
<td>We meet regularly</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We do a good job of communicating schedule changes that may affect mentoring meetings</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We notify one another if we cannot follow up or honor our commitments to each other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We eliminate outside influences and distractions when we meet</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We check out our assumptions</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our communication is clear and misunderstandings are infrequent</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We check in with each other to make sure that we stay on track with the learning goals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We provide feedback regularly and make sure it is two-way</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Our meetings are relevant, focused, and meaningful</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We acknowledge and address conflict when it occurs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>We are conscientious about safeguarding confidentiality</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Tool 4: Strategies and Considerations for Initial Conversations

<table>
<thead>
<tr>
<th>To-Do List</th>
<th>Strategies for Conversation</th>
<th>Mentor Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take time to get to know each other</td>
<td>Obtain a copy of the mentee’s bio in advance of the conversation. If one is not available, create one through conversation</td>
<td>Establish rapport. Exchange information. Identify points of connection</td>
</tr>
<tr>
<td>Talk about mentoring</td>
<td>Ask: Have you ever been engaged in a mentoring relationship? What did you learn from that experience?</td>
<td>Talk about your own mentoring experiences</td>
</tr>
<tr>
<td>Determine the mentee’s goals</td>
<td>Ask: What do you want to learn from this experience?</td>
<td>Determine if the mentee is clear about his or her own goals and objectives</td>
</tr>
<tr>
<td></td>
<td>Give the mentee an opportunity to articulate broad goals.</td>
<td></td>
</tr>
<tr>
<td>Determine the mentee’s relationship needs and expectations</td>
<td>Ask: What do you want out of the relationship?</td>
<td>Be sure you are clear about what your mentee needs of wants form this mentoring relationship. If you are not, encourage the mentee to think through what he or she wants form the relationship</td>
</tr>
<tr>
<td>Define the deliverables.</td>
<td>Ask: What would success look like for you?</td>
<td>Do you have an area of experience or expertise that is relevant to this person’s learning goals?</td>
</tr>
<tr>
<td>Share your assumptions, needs, expectations, and limitations candidly</td>
<td>Ask for feedback. Discuss: Implications for the relationship</td>
<td>What are you willing and capable of contributing to the relationship</td>
</tr>
<tr>
<td>Discuss options and opportunities for learning.</td>
<td>Ask: How would you like to go about achieving your learning goals?</td>
<td>Discuss implications of each other’s styles and how that might affect the relationship</td>
</tr>
<tr>
<td></td>
<td>Discuss ways: learning and communication styles.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ask: What is the most useful kind of assistance I can provide?</td>
<td></td>
</tr>
</tbody>
</table>

**Tool 5: Streamlined Mentoring Partnership Agreement Templates**

Instructions: This is a more streamlined mentoring partnership agreement. Use this template after completing the negotiating conversation.

<table>
<thead>
<tr>
<th>Goals:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning outcomes:</td>
<td></td>
</tr>
<tr>
<td>Ground Rules:</td>
<td></td>
</tr>
<tr>
<td>Parameters for the relationship:</td>
<td></td>
</tr>
<tr>
<td>Steps to Achieving the Goals and Learning Outcomes:</td>
<td></td>
</tr>
<tr>
<td>Time Frame:</td>
<td></td>
</tr>
<tr>
<td>Checkpoints:</td>
<td></td>
</tr>
</tbody>
</table>

Tool 6: Long Distance Mentoring Interaction Reflection

Instructions: As you reflect on each of the question below, focus on your most recent mentoring session. This reflection is most effective when the mentee completes a copy of it as well and the mentoring partners then discuss their reflections and develop action strategies together.

1. What went particularly well during our mentoring session?

2. What relationship challenges did we face:
   - Were we communicating effectively with each other?
   - Were we candid and open in our communication?
   - Did we take care to check out assumptions with each other?
   - Were we actively listening to each other?

3. What learning challenges emerged?
   - What did we do to hold ourselves accountable for the learning?

4. What logistical challenges affected our communication?
   - Were the venues (email, telephone, meetings) we have selected working for us?
   - Were there external factors, such as time and access, that affected our interaction in any way?

5. What three strategies could improve the quality of our mentoring interaction?

6. What is the action plan for implementing each of the three strategies?

## Tool 7: Tips for Mentors in Providing Feedback

<table>
<thead>
<tr>
<th>What to Do</th>
<th>How to Do It</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Align your feedback with the mentee’s agenda</td>
<td>Provide real-time feedback. Make it usable and realistic. Offer concrete practical steps and options</td>
<td>“I have a few ideas that might help…” “What works for me is…”</td>
</tr>
<tr>
<td>Provide feedback about behavior that the mentee can do something about</td>
<td>Stay with the mentee’s behavior rather than succumb to the temptation to evaluate it</td>
<td>“Tell me about the impact of the behavior…” How might someone else see that behavior…”</td>
</tr>
<tr>
<td>When you talk from your perspective, remember that your reality is not the mentee’s reality</td>
<td>When you talk about your own experience, set a context and be descriptive so that the mentee can see the parallels</td>
<td>“In my experience, which was…, I found that… I know that is not your situation, but maybe there is something to learn here.”</td>
</tr>
<tr>
<td>Check your understanding of what is being said</td>
<td>Listen actively Clarify and summarize</td>
<td>“If I understand what you are saying…” “Help me understand what you mean by…”</td>
</tr>
<tr>
<td>Use a tone of respect</td>
<td>Take care not to undermine the mentee’s self-esteem</td>
<td>“I liked the way you…” “I am curious…” “I wonder…” “Have you ever considered…?”</td>
</tr>
<tr>
<td>Be aware of your communication style and how that works with that of your mentee</td>
<td>Share information about communication styles with your mentee, and discuss the implications for the feedback cycle.</td>
<td>“I find that I get defensive when…” “I react positively to…”</td>
</tr>
<tr>
<td>Avoid giving feedback when you lack adequate information</td>
<td>Ask for time to get the information you need. Faking it doesn’t work.</td>
<td>“To be honest with you, I need to think about that a little more”</td>
</tr>
<tr>
<td>Encourage the mentee to experience feedback as movement forward rather than interruption from the journey</td>
<td>Continuously link progress and learning to the big picture and the journey</td>
<td>“When we started out… And then… And now…”</td>
</tr>
</tbody>
</table>

**Tool 8: The Closure Conversation: Core Elements**

From the mentee’s perspective:

<table>
<thead>
<tr>
<th>Core Elements</th>
<th>Questions to Address</th>
</tr>
</thead>
</table>
| Coming to learning conclusion: the specific learning derived from the mentoring experience | Did I achieve my learning goals?  
If yes, what did I learn as a result?  
If no, what got in the way?  
What was the most valuable thing my mentor taught me?  
What specific insight, approach, or perspective did I gain?  
What else do I need to learn?  
What did I learn about myself as a person?  
What has being in this relationship taught me about myself as a learner?  
What would I do differently in my next mentoring relationship? |
| Integrating learning: applying and integrating what you learned and taking it to the next level | How will you apply what you’ve learned?  
What will you do as a result of what you’ve learned?  
What specific action steps will you take? |
| Celebrating success: reinforcing learning and expressing appreciation | What are the meaningful ways to celebrate what you’ve accomplished?  
How will you express your appreciation to your mentor? |
| Redefining the relationship: spelling out how your relationship will be different once this phase of the relationship ends | What happens after the mentoring relationship?  
Do you want to continue to be in contact?  
If so, on what basis? |

Where to find more help

AIIP

- Mentoring Committee

- “Win-Win Mentoring: Perspectives from the Mentoring Committee” webinar recording at http://www.aiip.org/WebinarView-2010-Bate-Nottingham-Mentoring.


- http://www.aiip.org/GrowYourBusiness
  - Business Planning and Management
  - Your Small Business
  - You and Your Clients
  - Legal Agreements
  - Information Management
  - Research and Information Skills

- AIIP directory: search the membership directory for members who offer paid-for mentoring

- AIIP-L: search threads such as rates, business plans, finding clients

Web resources


The Mentoring Group provides consulting/technical assistance, skill-based training, skill assessment, research/evaluation, and publications related to mentoring. It is a division of the not-for-profit corporation, the Coalition of Counseling Centers, Inc. The website features many helpful tips, ideas and articles in addition to products for sale.

  Effective Mentoring relationships: the mentor’s role 2 parts

  Essentials for mentors, 2 parts

  Back to the Basics for Mentees, 2 parts


Books and articles

Acknowledgement

The Mentoring Committee gratefully acknowledges the generosity of Dr. Lois Zachary, President of Leadership Development Services, LLC, who has permitted us to quote extensively from her publications and reproduce her mentoring tools. Dr. Zachary can be reached through her company, Leadership Development Services, LLC at http://www.leadershipdevelopmentservices.com.