

# **AFP Charlotte Mentoring Orientation & Guidelines**

## **Mentoring Class of 2012**

- Mentoring the next generation of development officers is a shared professional responsibility of all development officers.
- Mentoring involves a more experienced, skilled, and practiced mentor who facilitates a less experienced, developing individual's (mentee) professional development.
- Successful mentoring is a dynamic process that evolves through a series of stages, whereby each participant learns to respect and trust the other's commitment, expertise, and individuality.
- The focus of mentoring should be on the advancement of professional and practical knowledge of the mentee, helping them toward an understanding of the skills, knowledge, and professionalism within the philanthropic community.
- Effective mentoring roles will vary and can be those of advocate, advisor, role model, guide, coach, and sounding board.
- Mentees should utilize multiple resources tools in their professional development and will not be limited to or by the mentor or mentoring relationship.
- In mentoring programs that have a colleague-pairing component, it is often this aspect that provides the most satisfaction for both mentor and mentee because it is so personal and empowering.

## **I. Getting Started - Expectations**

### ***A. Setting up the Meeting***

First stages are usually awkward and tentative. The mentor should take the initiative early in the process since a mentee may not be comfortable taking the lead at the beginning. Sometimes mentees are uncomfortable about calling the mentor or about identifying needs and problems because they feel the mentor is too busy, the task too trivial, or they will appear too needy.

Mentors, on the other hand, sometimes fear that if they may appear heavy-handed or intrusive if they pursue the mentee. These “miscommunications” can be avoided if discussed early in the pairing. As the relationship evolves, experience has shown that the most successful pairings occur when the mentee takes more responsibility for managing the relationship.

**Mentors:** be sure mentee knows how to contact you: email address, phone numbers, fax number, and best times. Mentees are also expected to provide this information to their mentor.

### ***B. Structure Your First Meeting and Prepare for Your Role***

Set aside at least an hour for the first meeting with your mentee. It can be helpful to structure the first one on one meeting because both partners often begin a mentoring relationship with high expectations and some uncertainty about how to proceed.

**Mentors and mentees:** give some thought to how you would like the meeting.

Use this time to get to know other aspects of your mentee. Is s/he married, partnered? Have children? Any hobbies? Share similar information about yourself.

It is recommended that you conduct the majority of your meetings away from your office.

### ***C. Agree Upon the Duration, Frequency and Length of Your Meetings***

Agree upon when and where you will meet (your office, a breakfast meeting, etc.). Plan to keep your commitments for your meetings with your mentee and vice versa. If possible have meetings at least once a month. Some conversations could also take place via phone or email.

### ***D. Clarify and Respect Confidentiality***

Some mentee and mentor pairs will feel a need for complete confidentiality in their relationship, others will not. It is critical that you and your mentee clarify the limits of confidentiality in your relationship.

## **II. Managing the Evolving Mentoring Relationship**

### ***A. Assist Your Mentee in Clarifying Interests and Needs***

Ask your mentee to carefully identify his or her personal philosophy and professional experiences for this mentoring relationship before meeting with you (questions related to types of organizations, experience in different areas of development). Ask for a copy of your mentee's resume before first meeting.

When giving feedback, be mindful of preserving your mentee's sense of self-confidence. Use confrontation and feedback skills to give clear, non-judgmental descriptions of behavior and to show the relationship to results obtained. Assist your mentee in recognizing potential outcomes prior to taking actions.

### ***B. Reach Agreement About the Goals of Your Relationship***

He or she should provide additional clarity and background about career goals and aspirations. After learning more about your mentee's professional goals and particular concerns about career development, work together to finalize the list of goals that you feel can be adequately addressed during this experience. The mentee's readiness and willingness to be mentored will be a factor that affects the degree of progress in the relationship. The process usually requires a trial and error stage until each determines how to achieve the appropriate quality and quantity of support. The key is to start where the mentee is and move at an agreeable pace.

### ***C. Provide Examples of Good Practice***

Prepare to assist your mentee by giving some advance thought to what your own lessons of experience have taught you. What support were you given that you can now pass on to your mentee? What discoveries did you make on your own, and how can you ease the path for this development officer?

Plan to share your experiences, perspectives, and approaches to gaining your status as a professional development officer and or your status as a designated CFRE. An exploration of your own professional development can be particularly valuable. Consider sharing some of the key challenges you were confronted with in terms of developing your skills set, career choices, philosophy, and work/family balance, etc.; including the options you identified for resolving issues; your decision-making strategies; actions you took; and outcomes you obtained.

If possible and appropriate, engage in a collaborative activity with your mentee. It's important for mentors to make explicit the rationale for their strategies, decisions, and philosophy because a mentee cannot learn the skills set, strategies and philosophy that increase professional development alone.

#### ***D. Encourage Risk-Taking***

Set some immediate goals and activities with short-term benefits. Encourage your mentee to think about the longer career focus and to stretch aspirations beyond the first identified goals. The mentoring relationship can be a safe place to take risks.

#### ***E. Honor Autonomy***

Check periodically to see that your mentee remains his/her own person and you are not expecting a friend, student, follower, or clone (unless you have agreed on these roles). Seek your mentee's opinions and views and expect your mentee to disagree or challenge yours. One delicate but essential part of successful mentoring is that the mentee must move away from the mentor as you become peers.

#### ***F. Encourage Networking***

Professional socialization into philanthropy relies on whom one knows as well as what one knows. Getting to know other faculty and becoming known in the profession can enhance the mentee's reputation, visibility, and ability to network. Encourage your mentee to take part in AFP activities, committee work, and social activities, etc. If appropriate, integrate your mentee into your own professional networks and make critical contacts.

#### ***G. Recognize the Value and Limits of the Relationship***

Like any relationship, this match involves a dynamic process in which the uniqueness, individuality and expertise of each member of the pair needs to be respected. You are not expected to respond to all of your mentee's needs. Be judicious in how you spend your time together and clarify the ways in which you will choose to be of support. While sharing your expertise, refrain from telling a mentee what to do, so that you limit their dependency on you.

Recognize that one size does not fit all and that your mentee's personality, gender, background, or style may preclude him or her from achieving the results you obtained, using your particular techniques or approach. Assist your mentee in recognizing the options available for action and selecting the one that will work best for him or her.

Recognize that some advice you offer may seem irrelevant to your mentee at this time, but may prove to be useful later on. It will ultimately be your mentee's choice as to how he or she will integrate the insights gained into his or her own evolving style, methods or approach. Your guidance and wisdom will nevertheless be invaluable. Look for opportunities for your own enrichment, as mentors often find value in the questions or fresh perspectives of mentees.

#### ***H. Setting Goals for Each Subsequent Meeting***

Mentees should be encouraged to set goals for future meetings. As with all goal-setting, you do not need to strictly adhere to the goals you initially agree to, as other more vital matters or

pressing priorities may arise. Nevertheless, some foresight and support in advanced planning can keep your relationship productive and worthwhile for both participants.

#### ***I. Participate in AFP Charlotte Professional Activities***

AFP Charlotte's board of directors recently approved this Mentoring Program, which will be chaired by an AFP member with advanced professional development experience. Twice per year the chair presents to the board of directors the program initiative and year end surveys. AFP Charlotte will provide training opportunities, and assist the chair and committee in creating the most effective mentoring program.

#### ***J. Bring Closure to Your Relationship***

Mentoring is an ongoing process however the mentoring relationship will end. It's important to bring closure to the relationship. Support your mentee in recognizing his or her achievements and encourage your mentee to use resources inside and outside AFP to continue to develop his or her career. Encourage your mentee to take reasonable risks and try out new skills. Recognize the value of your role in supporting this development officer and the long-term, beneficial effect that can accrue from relationships of this kind.

### **III. General Tips**

#### **A. Suggestions for Mentees:**

1. Share your professional background and purpose for participating in the Mentoring Program
2. Review your goals for your experience in the Mentoring Program
3. Identify ways your mentor can support you
4. Complete an action plan with goals and objectives for your mentoring relationship
5. Establish an agenda for each meeting
6. Summarize key learning points and express appreciation at each meeting
7. Find multiple mentors

#### **B. Suggestions for Mentors:**

1. Show genuine interest in your mentee
2. Be sensitive to gender and cultural issues.
3. Share your professional background along with personal information, as you feel appropriate.

4. Review the aspects of your role as an advanced development officer in which you feel you can be particularly helpful
5. Clarify which of your mentee's goals you believe you can support
6. Help your mentee develop a focus and agenda for subsequent meetings.
7. Suggest relevant readings and other resources, as appropriate.
8. Be willing to review drafts of strategies and work in process

#### **IV. What's In It For the Mentor?**

For some, mentoring is an addition to an already full plate. Why would an overburdened development officer say yes to such an additional role when given no money and must assume new responsibilities for the effective induction of a new member into the profession?

Adult development theory suggests benefits to mentors that can be of the same degree of worth as those of being a mentee. Some benefits include career development, emotional satisfaction, rejuvenation and creativity, increased self-awareness, personal growth, realization of the significance of the mentor's life and professional contributions, an fulfillment in passing on profession to the next generation.

AFP has members of all levels of professional experience. AFP Charlotte goal to develop and support new advancement professionals is only the first step in the process of creating first-rate development professionals. Mentoring programs are designed to cultivate this talent and thus represent an investment in the future of philanthropy.

Organizational development officer searches are expensive and time consuming...when organizations hire new officers, we don't want then to lose them. Mentoring aids in the retention of development officers.

*Mentor benefits can be categorized into four dimensions: Relationship, Professional, Skill, and Personal Esteem.*

On the Relationship Dimension, mentors benefit by seeing mentees grow into the profession, become more independent, and avail themselves of career-advancing opportunities. Mentors often feel a sense of pride in passing skills to the next generation. The pattern of giving mutual reinforcement through feedback is often a characteristic of the mentor-mentee relationship.

On the Professional Dimension, mentors feel that they are helping the organization and profession and are challenged, rejuvenated, and reinforced by their own professional identity. Sometimes the mentee's youth in the field and enthusiasm and new energy can foster a freedom

for mentors to re-evaluate old patterns of working. Becoming a mentor benefits not only the mentor and mentee, mentoring serves the profession as well.

On the Skill dimension, mentors report that they analyzed their own skills more, received stimulating ideas for use in their workplace and acquired a sharpened ability to effectively help another.

On the Personal Esteem Dimension, mentors were honored to be selected and felt important when asked by their mentee for advice. Emerging patterns of interaction suggest a “Mentor Mirroring Model.” The mentor takes a view of him or herself by observing the way others respond. The mentee sees desirable accomplishments and mirrors to the mentor a sense of worth that affirms and encourages the mentor.

Recognition for mentors and mentees is important by website and print announcements, by awards, and graduation, it serves the profession as well.

**Original Sources:**

1. Original outline created by Christine D. Des Jarlais, Assistant Dean for Graduate Outreach & Postdoctoral Affairs, CFAR Workshop October 6, 2004
2. Johns Hopkins Department of Medicine Career Development Guide, 2001
3. University of Hawaii at Manoa Faculty Mentoring Program “Working Wisdom: Some Guidelines for Mentors”
4. Stanford Faculty Mentoring Program Evaluation
5. CMSI Mentoring Solutions
6. RCR Education Consortium: Mentoring by P.D. Magnus, Michale Kalichman, September 2002
7. USC Center for Excellence in Teaching: Faculty Mentoring Paper Summary

*Edited to fit the AFP Charlotte Mentoring Program, September 19, 2007, by Linda Breen, AFP  
Charlotte Board of Directors and Mentoring Chair.*

*Revised September 21, 2011 by Ben Mohler, AFP Charlotte Board of Directors and Mentoring Chair.*