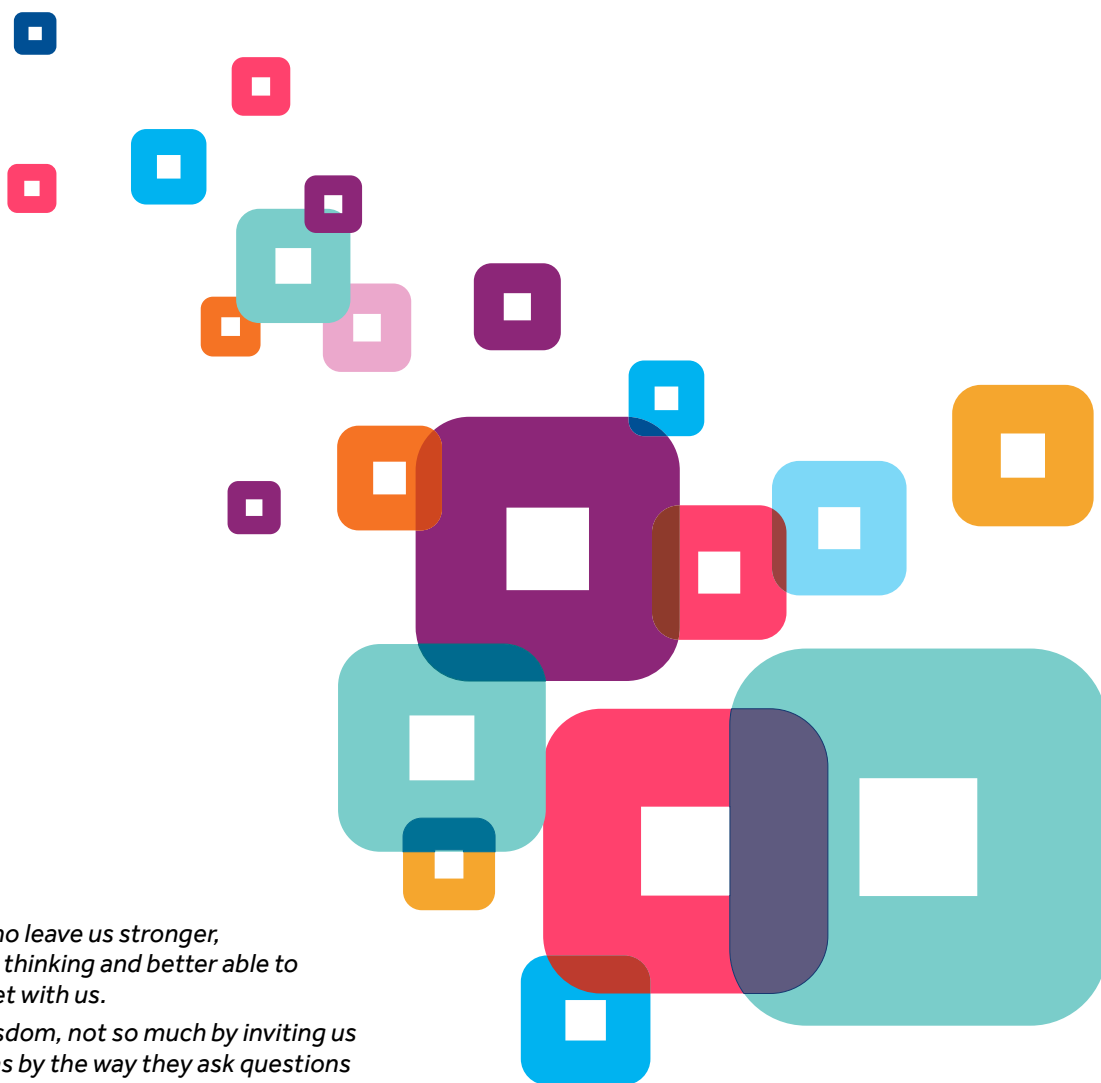


Stepping Up to the Challenge

Mentoring resource handbook



*Mentors are persons who leave us stronger,
more confident, clearer thinking and better able to
cope after they have met with us.*

*They help us grow in wisdom, not so much by inviting us
to adopt their wisdom as by the way they ask questions
which move us to deeper places of insight and perception ...
somehow we end up feeling more powerful ourselves.*

Broholm and Johnson

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Foreword

Cultural and linguistic diversity brings great benefits to boards and committees.

However, a significant pool of talent within our multicultural community is largely untapped. The Office of Multicultural Interests (OMI) 'Diversifying boards—Your cultural advantage' governance training program has been developed to address this gap.

This Stepping Up to the Challenge mentoring program is an important adjunct to the governance training program. It is designed to support those who seek to realise their full potential and, importantly, to step up to an active board position, whether it be in the public, corporate or not-for-profit sector.

In supporting participants, the program relies on the assistance of committed mentors—all successful leaders and experienced board directors. This allows participants to draw on the broader leadership and governance experience, and wisdom shared by mentors.

The program aims to create an inclusive, supportive and enabling learning

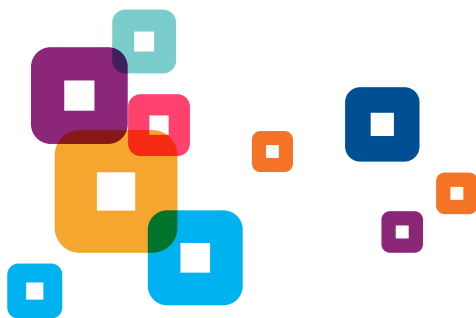
environment where participants are encouraged to excel in their chosen pathway.

Furthermore, harnessing the talents of the participants has wide-reaching impacts that will benefit businesses and services and improve the State's local, national and global competitiveness.

James Jegasothy

A/Executive Director

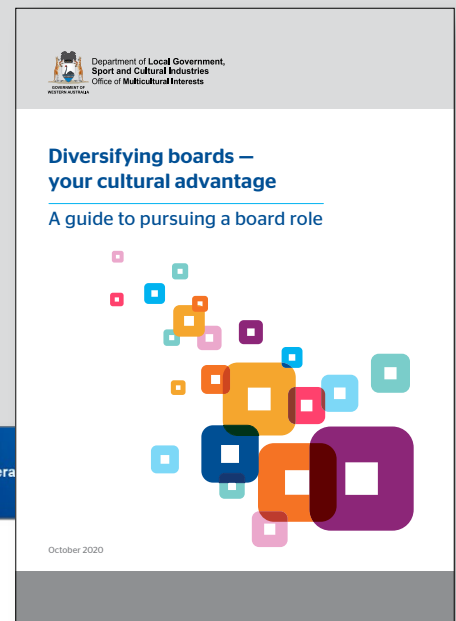
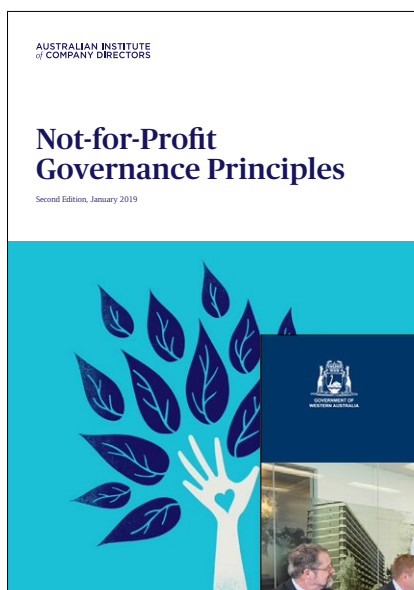
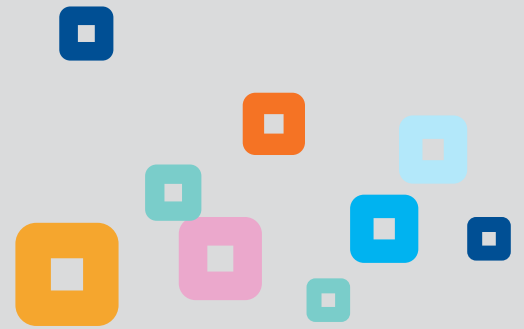
Office of Multicultural Interests



About this guide

This guide aims to provide user-friendly information to equip OMI mentors with practical mentoring guidance and strategies to enable their mentees to realise their full potential and, importantly, step up to an active board position.

This document complements and should be used in conjunction with the essential resources listed at the end of this booklet, which support the Stepping Up to the Challenge OMI mentoring program, and are included in your program pack.



Introduction to the OMI mentoring program

1. Objectives of the OMI mentoring program

The principal objective of the OMI mentoring program is to support OMI Governance Training participants in their learning and provide guidance and assistance in their journey to nominate for and secure places on a board or committee.

In achieving these objectives the OMI mentoring program aims to create a secure and supportive introduction to board practice. The program further aims to have a win-win impact for both mentees and their mentors.

The full program involves:

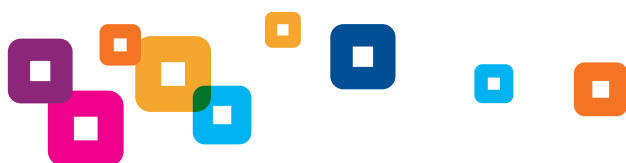
- 1. Introductory training sessions**, which involve four full days' leadership and governance training followed by an orientation session.
- 2. A set of resources** to complement the introductory training sessions including:
 - Stepping Up to the Challenge Mentoring Resource Handbook (this document)
 - *Diversifying boards—Your cultural advantage*, Office of Multicultural Interests
 - *Governance Principles for Not-for-Profits, 2nd edition* (2019), Australian Institute of Company Directors
 - *Corporate Governance Principles and Recommendations*, 4th edition (2019), ASX Corporate Governance Council
 - *Board Essentials* (2020), Public Sector Commission Western Australia.

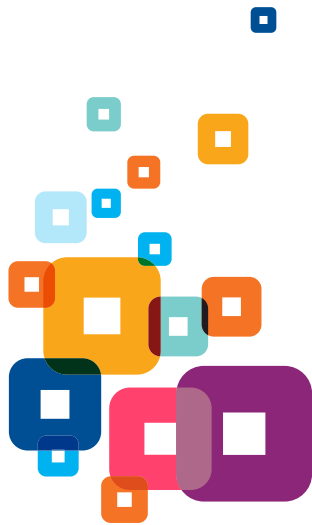
2. What is mentoring?

Mentoring is intended to be a one-to-one relationship in which the mentor invests their time, knowledge and effort to help the mentee reach their potential as a person and as a professional in their behaviour, knowledge and skills.

Mentoring is a very old method of human development and its origins lie in the Stone Age, when the artists who painted on cave walls, the stone-carvers, the medicasters who used medicinal herbs to heal sicknesses, and others instructed the youths of their clan, in order to transmit to them their knowledge, thereby contributing to the evolution of civilization.

In today's complex business environment, mentoring may be more important than ever, particularly when that relationship occurs between members of the same organisation. Research shows it is an extremely effective way for individuals and groups to develop new skills, navigate diverse environments and understand how to deal with people and challenges. A good mentoring relationship benefits the mentor, the mentee or group of mentees, and their respective organisations and communities.





3. Stepping Up to the Challenge mentoring program

In the context of the OMI mentoring program, mentoring is a relationship between an experienced board member selected by OMI and a mentee who has completed the OMI Governance Training Program. The mentor provides guidance and assistance to the mentee in their journey to seek out, nominate for and secure places on a board or committee.

The mentee, within the context of this mentoring program, is seeking information and knowledge about the workings of boards within the public, corporate and public sectors.

The Stepping Up to the Challenge mentoring program is a structured over twelve months. Mentors and mentees are matched, trained and sign an '*OMI Partnership Agreement*' outlining the two fundamental principles of the partnership: *Confidentiality and Mutual accountability*.

Mentorship will be monitored by OMI and the experience formally evaluated at the end of the twelve-month period.

The monitoring will be conducted through confidential separate 'check-in' conversations with both mentees and their mentors.

The process of the mentoring will be in a semi-structured format, as a one-on-one relationship between the mentor and the mentee.

The mentoring session can take place face-to-face, via telephone and online over the twelve-month period; with the suggested duration of each session being approximately one hour.

The primary purpose of the mentoring relationship is to help develop the mentee to step up to board responsibilities. The mentee is therefore required to be proactive and help to create an agenda and a relationship that reflects the types of governance/board goals they would like to achieve.

Mentors are offering their valuable time to the mentees, so therefore it is the mentee's responsibility to make the most of that time and, importantly, set the agenda for each mentoring session.

The mentor is not expected/obligated to find/secure a board role for their mentee(s).

4. The benefits of mentoring

Mentoring is an effective means of preparing OMI Governance Training recipients to step up to new board positions and participate in the work of the board. Mentoring is a complement to the OMI Governance Training Program, and is an efficient way of sharing knowledge and developing cross-functional understanding between experienced and less experienced individuals. It reduces the steep learning curve for any prospective board member and allows them to engage productively early in their board tenure.

The Stepping Up to the Challenge mentoring program aims to create a secure, safe and welcoming introduction to board practice. The program further aims to have a win-win effect for both mentees and their mentors.

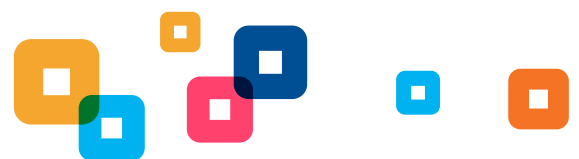
The benefits for the mentee

- Association with a successful role model from within the culturally and linguistically diverse (CaLD) and the wider community.
- Increased access to board role opportunities.
- Building diversity and social capital within the board structure.
- Expanded knowledge of board leadership skills and practices.
- Become better orientated to board services and more empowered to engage with a board.
- Opportunity to discuss issues with a respected experienced board member.
- Ongoing support and encouragement.
- Honest and constructive feedback.
- Support in building a professional network.
- Increased confidence, heightened career aspirations and understanding of how to take a leadership role on the board.



The benefits for the mentor

- Recognition as a successful board member.
- Opportunity to reflect on own skills and practices.
- Added incentive for staying current in the field of governance.
- Increased feeling of self-worth from contributing to the development of an individual.
- New levels of communication resulting in increased levels of trust.
- Exposure to fresh ideas and new insights.
- Personal satisfaction in sharing experience.
- Sense of pride in a mentee's accomplishments.
- New contacts.



5. Three mentoring services

The mentor can provide a range of services to their mentee.

These are:

- **guidance**
- **facilitation**
- **input.**

By providing one or all of these services for their mentees, mentors can speed up the mentees' board development process with the aim of accelerating board opportunities and helping to ensure the quality of their board development.

Guidance

Without guidance from a mentor, individuals may go through their board development lacking the wisdom they need to learn readily and effectively.

The mentor provides direction and feedback to the mentee that is both effective and ethically balanced; and importantly fosters courage for decisive action and moral integrity.

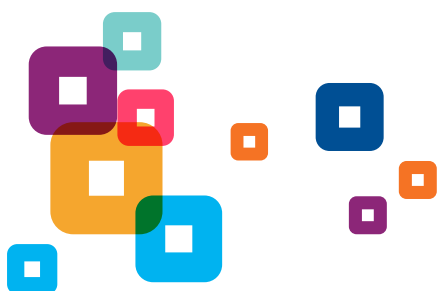
Facilitation

The mentor uses his/her influences and networks of board relationships to provide opportunities for the mentees to step up to new board positions. The mentor provides learning opportunities that stretch and challenge the mentee.

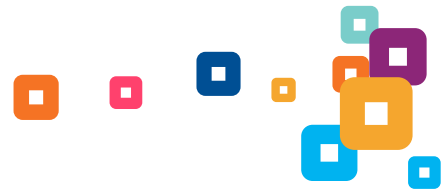
The mentor can introduce the mentee to other board members from whom they can learn valuable aspects of governance.

Input

Focuses on the four learning areas of knowledge, skills, character and the development of a compelling reason to step up to new board opportunities. As required, the mentor offers the mentee one-on-one assistance that could accelerate the mentee's board opportunities.



Reference: Kouzes, JM and Posner, BZ (2007) *The Leadership Challenge*, 4th edition, Jossey-Bass Publishers.



The process

1. The mentee and mentor pairing process

The relationship is absolutely key, without the relationship, there isn't mentoring
Fleming and Golding, 2003

The success of the OMI mentoring program relies on the quality of thoughtful insights provided by the mentors, and the quality of proactive questioning and response by the mentees. OMI therefore acknowledges the importance of matching individuals appropriately and, as such, endeavours to lever the benefits of the mentoring program through carefully choosing the mentor and mentee partners. Where an appropriate pairing cannot be made immediately, OMI will advise the mentor accordingly and endeavour to seek an appropriate match within the next group of mentees that apply.

In the pairing process, OMI considers a range of factors when agreeing upon an appropriate pairing. The priority order of selection will be kept completely confidential at all times.

Any suggestions, advice or comments shared between a mentor and mentee are confidential to both parties independent of OMI. Mentors organised through OMI are voluntary and do not act on behalf of OMI. Advice and/or action taken by a mentee will be totally at their own discretion.

The relationship between a mentor and a mentee is left to their own appreciation. Should any of the parties feel dissatisfied with the other for any reason whatsoever, relations may be discontinued and OMI notified. In such a situation, OMI may assign an alternative mentor/mentee if requested.



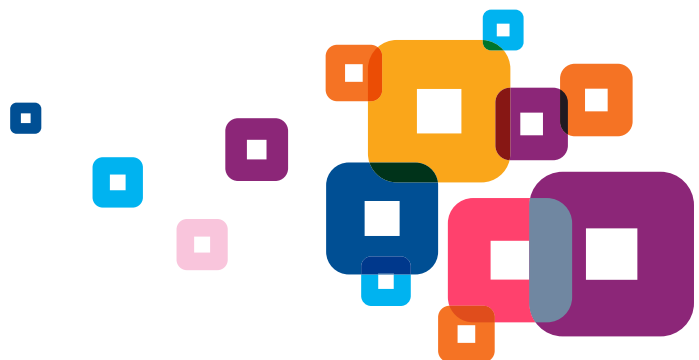
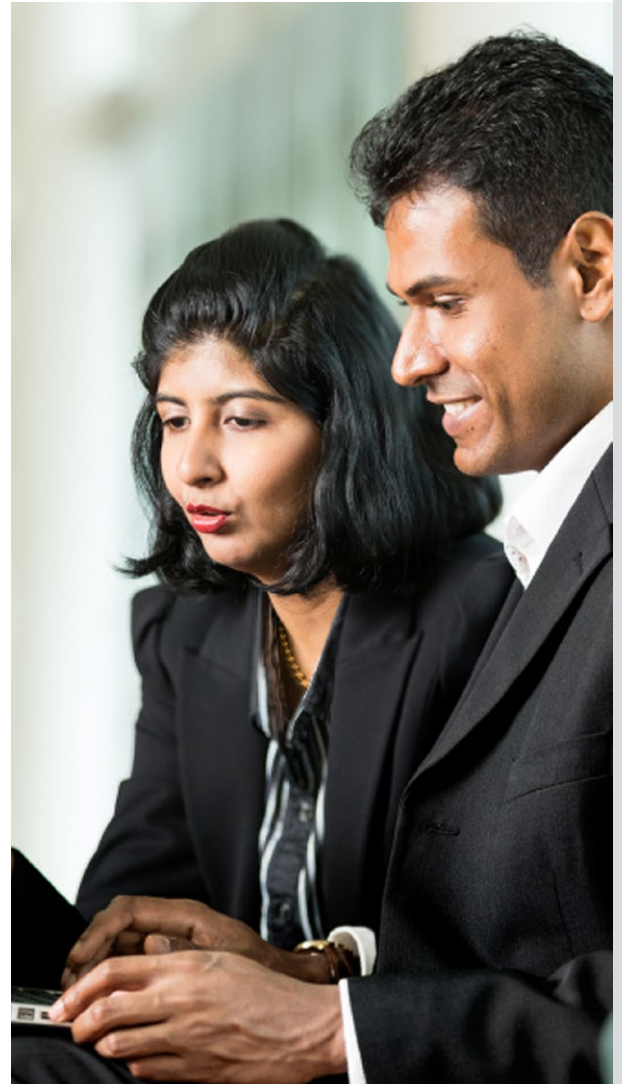
2. Confidentiality and mutual accountability

Mentors and mentees are asked to follow the OMI mentoring confidentiality and mutual accountability requirements below. These statements provide important guidance to both mentors and mentees regarding their mentoring relationships.

These boundaries protect the rights of all mentoring participants.

The requirements are:

- all conversations will be held in strict confidence
- trust, confidentiality and mutual accountability are critical components of the mentoring relationship and will be maintained at all times
- active participation by the mentor and mentee in all mentoring sessions is required
- commitment to the mentoring relationship is an important part of all mentoring sessions
- professional conduct will be maintained at all times throughout the mentoring relationship
- any mentors or mentees who are having difficulty in their mentoring relationship should contact OMI, who will discuss an appropriate course of action
- failure to comply with any of the above by either the mentor or mentee can lead to the termination of the OMI mentoring relationship.



3. Roles and responsibilities

The overall characteristics of a successful mentoring relationship require both mentor and mentee(s) to establish clear boundaries around confidentiality and mutual accountability, clearly articulate mutual expectations, and measure progress against the mentee's individual learning goals.

Establishing a set of basic roles and responsibilities can support a successful mentor/mentee relationship. The following points outline the basic roles and responsibilities for both mentor and mentee, and as such are to be seen as a baseline rather than a prescriptive set of guidelines.

Mentee roles and responsibilities

Role

- Participate in a positive mentoring experience that supports the learning journey to nominate for and secure places on a board or committee.
- Establish a good relationship with the OMI-appointed mentor.
- Build a relationship of mutual trust and respect.
- Be open to feedback.

Responsibilities

- Make a necessary twelve-month commitment to the program.
- Meet for at least one hour every month for twelve months.
- Attend the Stepping Up to the Challenge mentoring orientation training session.

Requirements

- A desire to nominate for and secure a place on a board or committee.
- Knowledge and/or desire to advance understanding of governance.
- The ability to fulfil the program requirements determined by OMI.

Time commitment

At least one hour every month for twelve months (dates and times to be confirmed by mentor and mentee).

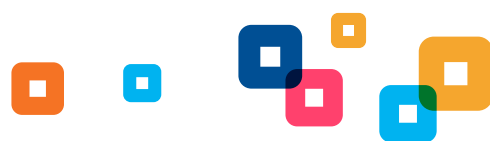
Meeting place

The mentoring sessions will be held at a place agreed upon by the mentor and mentee.

Mentor roles and responsibilities

Role

- Participate in a positive mentoring experience that supports the learning journey to enable the mentee(s) to nominate for and secure places on a board or committee.
- Contribute experience and wisdom on issues relating to governance by increasing the practical knowledge of governance issues of the mentee(s).
- Establish a good relationship with the OMI-assigned mentee(s).
- Build a relationship of mutual trust and respect.
- Offer insights on board dynamics, governance and leadership, with no background politics or hidden agendas.



- Provide support to build confidence and expand governance skills by providing an opportunity for deeper thinking, reflection and guidance.
- Facilitate individual mentoring sessions in accordance with the needs of the mentee.
- Provide honest, authentic and constructive feedback.

Responsibilities

- Make a twelve-month commitment to the program.
- Meet for at least one hour every month for twelve months.
- Attend the Stepping Up to the Challenge mentoring orientation training session.
- Link mentee(s) with any board opportunities that may arise during the twelve-month program.

Requirements

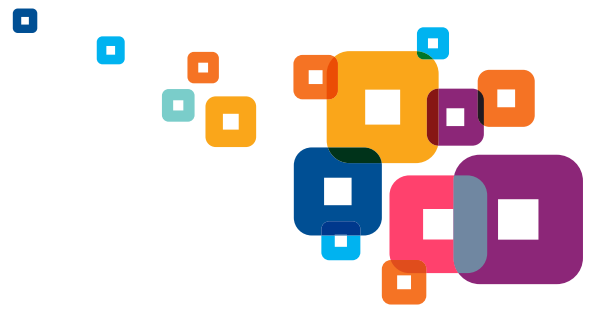
- A desire to be an OMI mentor and willingness to share governance expertise.
- A knowledge or desire to advance the mentee's understanding in governance, and to assist them to nominate for, and secure places on, a board or committee.
- The ability to fulfil the program requirements outlined by OMI.
- A commitment to increasing cultural diversity on boards.

Time commitment

- At least one hour every month for twelve months (dates and times to be agreed upon by both mentor and mentee).
- Determine and self-regulate any additional time required for one-on-one mentoring between mentor and mentee(s).

Meeting place

- The mentoring sessions will be held at a place agreed upon by both mentor and mentee.



4. Setting boundaries

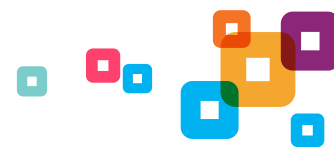
Setting boundaries in the mentoring relationship will help to support the mentor and mentee in having realistic expectations of each other.

A sample of effective boundaries might include identifying and agreeing on:

- conversation topics that are off-limits
- language/words that are off-limits
- what ways are appropriate to communicate with each another, at what times of day, and how frequently
- types of behaviour that are off-limits
- a definition of the role of the mentor and mentee(s)
- clarifying assumptions around confidentiality and mutual accountability.



5. Mentor checklist for fostering positive mentoring relationships



One of the interactions that mentees value most is where the mentor shares their experiences—not just the successes, but notably the challenges and pitfalls they may have encountered on their own board development journey.

Such discussions require good rapport and high levels of trust, but they offer mentees opportunities to further develop resilience and perspective from someone who has 'been there before'. At this stage of the relationship mutual learning can be experienced. The key to this is honesty and having the mentee's interests as the principal reason for sharing particular board experiences and perspectives.

To create an environment that enables a virtuous cycle of trust, respect and candour, the following checklist is helpful in ensuring a framework for trust is established:

1. establish ground rules for maintaining confidentiality and mutual accountability
2. determine individual expectations
3. be accommodating
4. be receptive to the needs of the mentee(s)
5. know when to ask for help
6. maintain momentum
7. be patient
8. know when to move on
9. foster genuine collegiality
10. summarise each session and ask for feedback.

6. Coming to closure

It may be necessary to bring the mentoring relationship to a close if a particularly challenging governance issue arises that the mentor is unable to address or support, or if specific behaviour by an individual is for some reason unacceptable.

In such a situation, the mentor, in conjunction with OMI, will assist the mentee(s) to define



the next steps in continuing to achieve their personal board development goals.

Notwithstanding the above, there may be a number of signs and signals that suggest that it is time to come to closure. When such signals are ignored or overlooked this may become detrimental to the mentoring relationship and dynamic.

7. Evaluation

Evaluation is an important tool in mentoring. It provides continuous improvement and a means of identifying ways to increase effectiveness at the individual mentee levels.

Each OMI mentee will complete a mentoring journal (see below) by documenting their development journey throughout the OMI mentoring experience.

The mentoring relationship will be monitored by OMI and the experience formally evaluated at the end of the twelve-month period. The monitoring will be conducted through confidential separate 'check-in' conversations with both mentees and their mentors.

8. Mentoring journal

OMI suggests that all mentees keep a mentoring journal throughout the duration of the twelve-month program. The journal is personal and confidential and aims to retain as much privacy as the mentee wishes while at the same time enabling them to discuss relevant parts of their journal with their mentor.

The journal is used to reflect upon the mentoring experiences and capture any important realisations or milestones achieved towards gaining or working towards a board position. Recording the findings throughout the entire mentoring period will help to monitor the mentee's own development and spot any consistently recurring themes or challenges.

Although many mentoring sessions will result in short-term action plans, it is important to remember that mentoring is a long-term process designed to assist the mentee to develop governance skills over a period of time beyond the duration of the program.

Through keeping a journal, reflective learners are likely to be more:

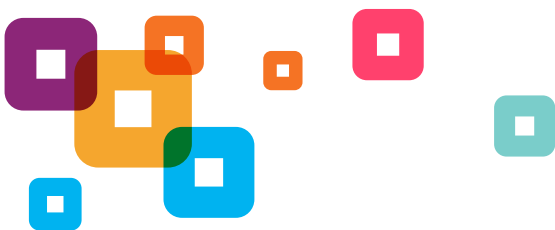
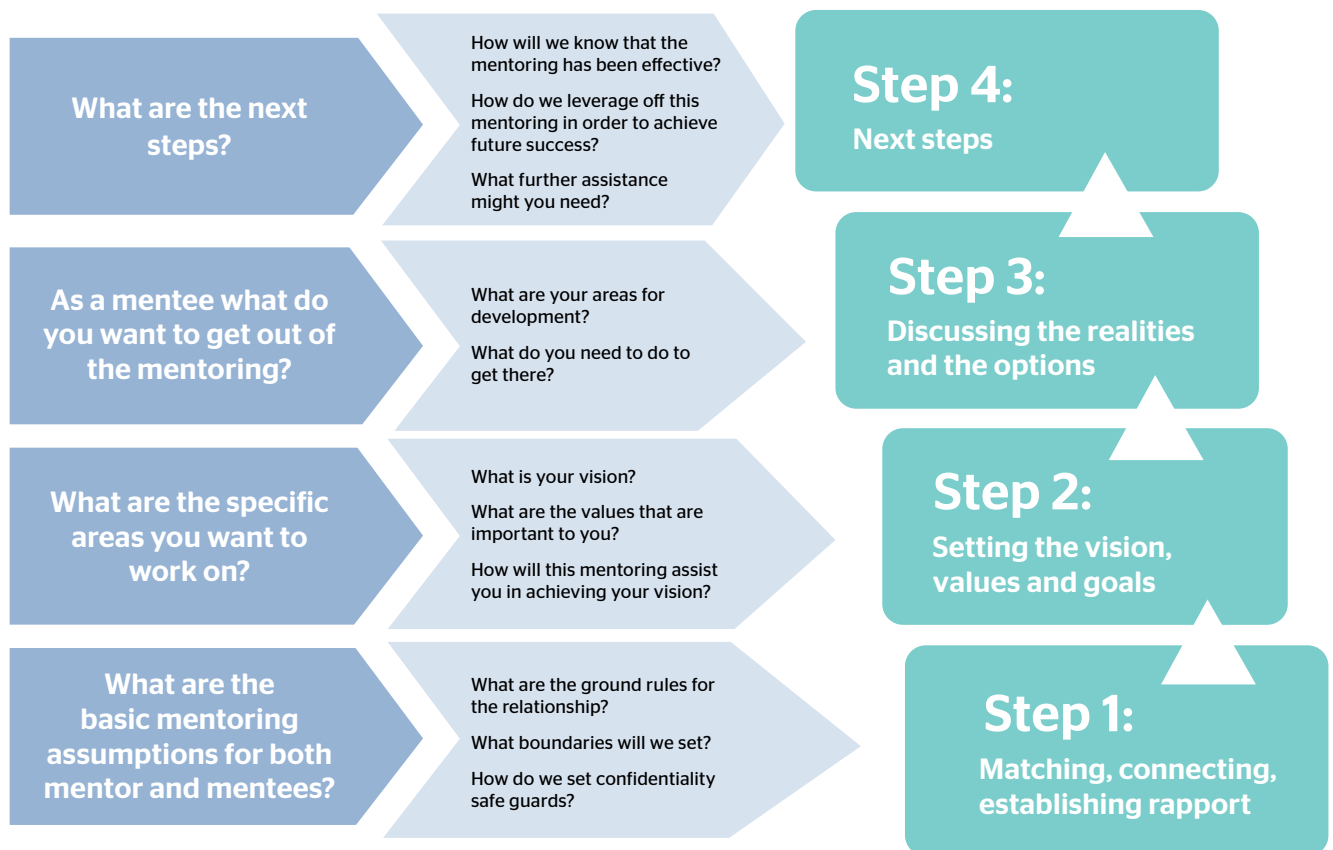
- self-aware
- self-evaluating
- more honest about themselves
- open to constructive feedback
- objective in weighing up evidence
- open to and prepared to try different approaches
- curious to discover other approaches
- motivated to improve.

Given these benefits, the mentoring journal is an integral component of the overall OMI Governance Program.



Mentoring pathway and techniques

1. Mentoring pathway



2. The GROW model

1. Goals
2. Reality
3. Options
4. Wrap up

The questions below are purely suggestions that can be adapted to reflect the mentor or mentee's own style, and used as a framework for the OMI mentoring session. Mentors and mentees can work through each part of the GROW process.

Goals

- What do you want to achieve out of this mentoring session/relationship?
- What are the goals you want to achieve?
- (Take each goal in turn) Why are you hoping to achieve this goal?
- What are your timescales? Are these feasible?
- What are the expectations of others?
- Who else needs to know about the plan? How will you inform them?
- What would need to happen for you to walk away from here feeling that this was time well spent?
- Do we have enough time in today's session?

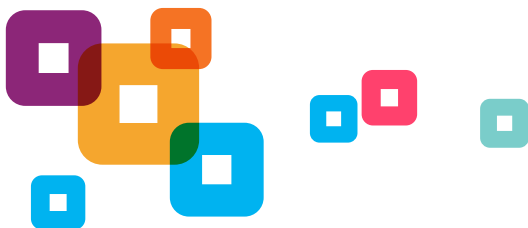
Reality

(Probe questions can be used here—what, when, where, how much, how often. Be cautious when using 'Why')

- What is happening now?
- How do you know this is accurate?
- What effect does this have?
- What other factors are relevant?
- What have you tried so far?
- (If you haven't achieved the goal already) What have been the obstacles to achieving this goal?
- Do you know anyone who has achieved this goal?
- What can you learn from them?

Options

- What could you do as a first step?
- What would happen if you did nothing?
- Who might be able to help?
- What else could you do?
- What are the benefits and pitfalls of these options?
- Would you like to choose an action to act upon?



Wrap up

- What are the next steps?
- Precisely when will you take them?
- What might get in the way? What support do you need?
- How and when will you enlist that support?
- Where does this goal fit in with your personal priorities at the moment?
- How committed are you to this goal?

In a mentoring context, there are many other questions that are much more useful and informative than WHY?:

- What do you hope to achieve?
- How are you going to go about it?
- Who will you ask for help?
- How will you know that you are succeeding?
- If you need to look back to past mistakes or difficulties, use questions such as:
- What could we have done differently?
- Who could we have asked?
- Is there a more efficient way of doing it?

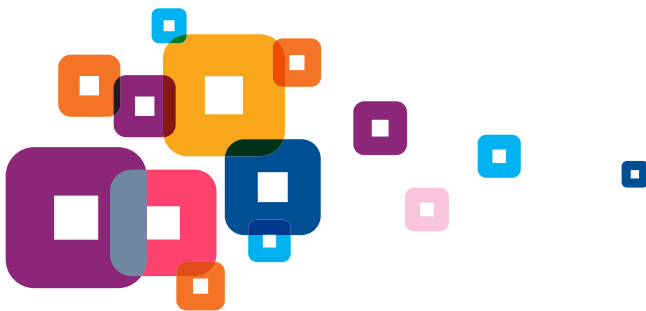
Asking questions

Undoubtedly one of the skills of a great mentor is the ability to ask the right question in the right way at the right time. This prompts the mentee to take responsibility for coming up with solutions, exploring options, challenging assumptions and gaining important professional and personal insights. Some useful questions to consider for the first meeting:

- What are your expectations of this process?
- What are your expectations of me as mentor?
- What are your expectations of yourself?
- What are your concerns?
- What would you like to achieve?
- How would you like me to assist you?

A good mentor uses very deliberate questioning techniques that push the mentee, gently but firmly towards uncovering critical issues, setting goals and forming a workable action plan. Mentoring questions serve many purposes. They can:

- stimulate conversation
- gain information
- develop a shared understanding
- check agreement
- build rapport and trust
- help the mentee reach their goals.
- Don't ask WHY—every question is better phrased as HOW!



Open and closed questions

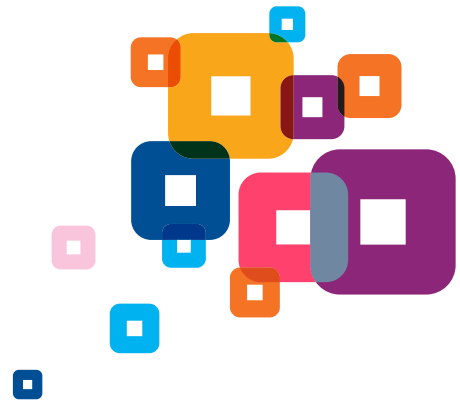
It is useful to divide questions into two categories: open and closed.

CLOSED questions are useful for gathering facts and directing the conversation. They elicit a brief (usually one word) response:

- did you find it interesting?
- what is your favourite colour?

OPEN questions are useful for exploring feelings and options. They:

- promote self-discovery and empowerment:
How do you think that mentoring will work for you?
- can be used to draw out a wide range of responses and options: If things were going really well—what would be different ...?



3. Useful tips for planning for mentoring sessions

- Discuss the best time and place for your mentoring sessions.
- Schedule approximately 60 minutes for each session. Although some mentoring can happen on the phone or via email, a face-to-face meeting usually works best. Pick a place that is quiet, offers some privacy and is convenient.
- Discuss the best way for the mentee and mentor to contact each other between mentoring sessions if necessary, and determine any limits/boundaries that need to be established around these contacts.

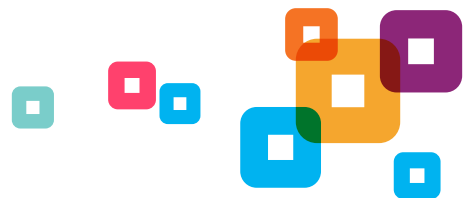


Adopted from Greene, J and Grant, AM (2003), *Solution-Focused Coaching*, Pearson Education Limited, Great Britain.

4. The top 10 effective listening tips for mentors

One of life's great challenges is to listen well. Listening, really listening with our whole being, is a skill and one of the most important aspects of a mentoring relationship. The following 10 'rules' can help.

1. Stop talking! It is difficult to listen and speak at the same time.
2. Put the other person at ease. Give them space, time and 'permission' to speak their piece. How we look at them, how we stand or sit, makes a huge difference. Relax, and let them relax as well.
3. Show the other person that you want to hear them. Look at them. Nod when you can agree, ask them to explain further if you don't understand. Listen to understand them and their words, rather than just waiting for your turn.
4. Remove distractions. Give the speaker your full attention, and let them know they are getting your full attention.
5. Empathise with the other person. Especially if they are telling you something personal or painful, or something you intensely disagree with. Take a moment to stand in their shoes and look at the situation from their point of view.
6. Be patient. Some people take longer to find the right word, to make a point or clarify an issue. Give the speaker time to get it all out before you jump in with your reply.
7. Watch your own emotions. If what they are saying creates an emotional response in you, be extra careful to listen carefully.
8. Be very slow to disagree, criticise or argue. Even if you disagree, let them have their point of view. If you respond in a way that makes the other person defensive, even if you 'win' the argument, you may lose something far more valuable!
9. Ask lots of questions. Ask the speaker to clarify, to say more, give an example, or explain further. It will help them speak more precisely and it will help you hear and understand them more accurately.
10. STOP TALKING! This is both the first and the last point, because all other tools depend on it. Nature gave us two ears and only one tongue, which is a gentle hint that we should listen twice as much as we talk.



This piece was originally written by Dr Philip E Humbert, Psychologist and Professional Coach, who can be reached at peh@newdreams.com

Mentoring booklist

Clutterbuck, D (2004) *Everyone Needs a Mentor: Fostering Talent in Your Organisation*, 4th edition, Chartered Institute of Personnel and Development, London.

Darling, Lu Ann (2008) *Discover Your Mentoring Mosaic: A Guide to Enhanced Mentoring*, Book Locker.Com Inc.

Kay, D and Hinds, R (2006) *A Practical Guide to Mentoring: How to help others achieve their goals*, How to Books.

Kouzes, JM and Posner, BZ (2007) *The Leadership Challenge*, 4th edition, Jossey-Bass Publishers.

Megginson, D, Clutterbuck, D, Garvey, B, Stokes, P and Garrett-Harris, R (2006) *Mentoring in Action: A Practical Guide for Managers*, Kogan Page.

Ragins, BR and Kram, KE (2007) *The Handbook of Mentoring at Work: Theory, Research and Practice*, Sage Publications, LA.

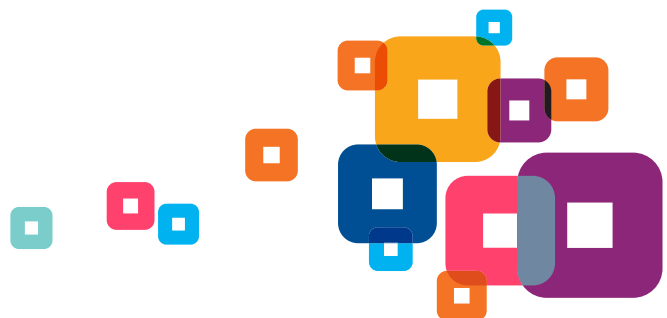
Scutt, J (1995) *Living Generously: Women Mentoring Women*, Artemis, Victoria.

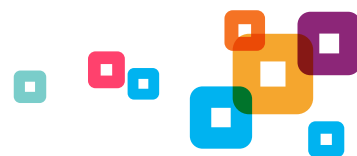
Stone, F (2004) *The Mentoring Advantage: Creating the next generation of leaders*, Kaplan Professional Company, Chicago.

Zachary, LJ (2012) *The Mentor's Guide: Facilitating Effective Learning Relationships*, 2nd edition, Jossey-Bass, San Francisco, CA.

Zachary, LJ (2012) *The Mentee's Guide: Making Mentoring Work for You*, Jossey-Bass, San Francisco, CA.

Zachary, LJ (2005) *Creating a Mentoring Culture: Fostering Talent in Your Organisation*, Jossey-Bass, San Francisco, CA.





Resources

Essential

These essential resources are included in the material provided:

Diversifying Boards—Your cultural advantage (2020) Office of Multicultural Interests

Governance Principles for Not-for-Profits, 2nd edition (2019) Australian Institute of Company Directors

Corporate Governance Principles and Recommendations, 4th edition (2019) ASX Corporate Governance Council

Board Essentials (2020) Public Sector Commission Western Australia.

Additional

Fact sheets are provided in a separate set and will be updated as required.

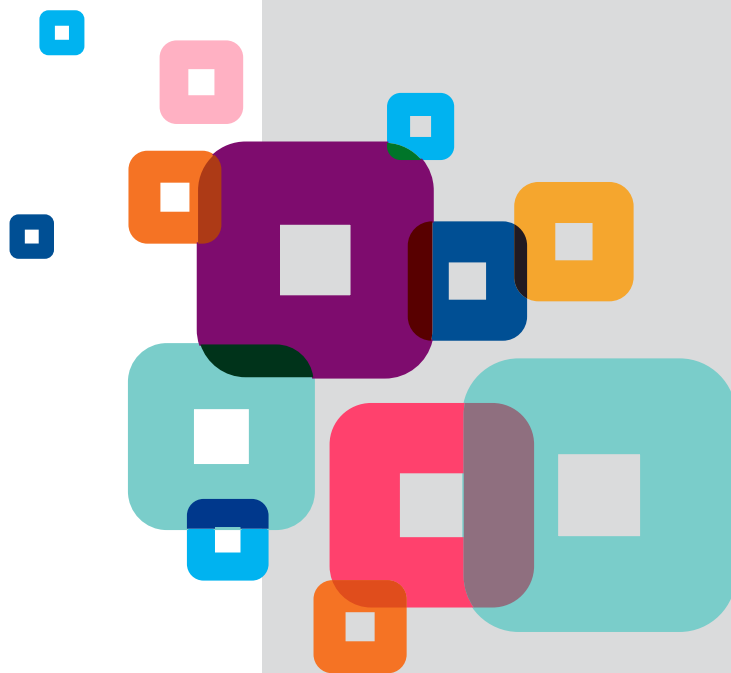


Fast facts are a series of stand-alone learning snapshots and checklists to support the mentoring discussions.



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