

**Formal / Volunteer
Mentor Training Manual Template**

By Jerry Sherk, *M.A.*

About This Document

Below is a list of documents that have been developed for this project. This document, "Formal / Volunteer Mentor Manual Template," is a component of the heading "Formal / Volunteer Mentoring Program."

This "Formal / Volunteer Mentor Manual Template" may be used by those wishing to develop a "Formal / Volunteer" mentoring system.

It is best to also utilize "Formal / Volunteer Program Design Guide" while working with this template. In addition, it is helpful to have previously read "Summary Report: Exploring Mentoring Program Models for Child Welfare Workers" and "Needs Assessment Guide for Three Mentoring Models."

The three headings on the document list below that are capitalized and underlined represent the core focus of this project. They are

- Formal / Volunteer Mentor, Mentoring Program (not a document)
- Formal / Paid Mentor, Mentoring Program (not a document); and
- Informal / Volunteer Mentor, Mentoring Initiative (an actual document)

All other documents are supportive of the development of these three major types of mentoring systems. The document you are now reading is shaded.

Document List

- Summary: Exploring Mentoring Program Models for Child Welfare Workers
- Needs Assessment Guide for Three Mentoring Models
- FORMAL / VOLUNTEER MENTOR, MENTORING PROGRAM (components are):
 - Formal / Volunteer Mentor, Program Design Guide
 - Formal / Volunteer Mentor, Mentor Manual Template
 - Formal / Volunteer Mentor, Mentor Manual
 - Formal / Volunteer Mentor, Trainer's Guide for Mentors
 - Formal / Volunteer Mentor, Mentee Manual Template
 - Formal / Volunteer Mentor, Mentee Manual
- FORMAL / PAID MENTOR, MENTORING PROGRAM, (components are):
 - Formal / Paid, Program Design Guide
- INFORMAL / VOLUNTEER MENTOR, MENTORING INITIATIVE
- Integrating Core Competencies
- Interactive Exercises for Program Trainers
- References

Introduction to the Mentor Training Manual Template

Use of the Template and the Design Guide

This Template can be used to develop your Mentor Training Manual. When completed, the Mentor Training Manual will help guide the program's new mentors through the initial training session, just before they are matched with their mentee.

The Template is intended to be used in tandem with "Formal / Volunteer Mentor, Mentoring Program Design Guide." Specifically, utilize Step 2 of the Design Guide, "Determining the Program Design." This process will help you to determine the scope, activities, rules, and overall policies and procedures of your program.

While using these two documents you will see they cover many of the same elements. The difference is that the Design Guide goes far beyond the Template, as it concentrates on a number of elements that are not contained within the Template, and it also goes into much greater detail. The Template itself contains relatively brief but important notes on how to construct the manual.

Inserting Information into the Mentor Training Manual Template

As you evaluate various programmatic areas, the Program Coordinator or the lead person can begin inserting information into this, the Mentor Training Manual Template. When you have finished creating your program's Mentor Training Manual, you will have developed your overall program structure. With the parameters and the description of the program spelled out, you will then be able to craft supplemental materials by using your completed manual as a guide.

Duplicate Before Starting

If this Mentor Training Manual Template came to you in the form of an interactive computer document, you should make a duplicate copy. This will be helpful if you later inadvertently delete part of it, or in case you choose to edit out specific items and then later decide that it would have been good to include them.

Deleting Template Notes

As you work with the Mentor Training Manual Template, you will notice that notes and instructions are highlighted in shading. As you move through each module you can delete these instructions when you no longer need them. When you finish inserting your own program specific information and deleting the shaded instructions, you will have completed your Mentor Training Manual.

To "unshade" a Word document, go to "Format" in the menu bar, bring up "Borders and Shading," and click on "Shading." Then highlight the text you want "unshaded." Go back to "Shading," and click "White" or "None."

"Standard" and "Program Specific" Areas

In the Template, some notes that describe how to develop your own manual will refer to "standard" areas. What this means is that some subjects, such as the "History of Mentoring," are relatively static, so there's no urgent need to make immediate changes to these sections. Still, if you want to revise these sections, please feel free to do so. It is suggested that you make changes after you complete the design of "program specific" areas, as they are more integral to shaping your mentoring system.

Throughout the Template the term "program specific" is used for elements that are particular to your program. For example, program specific items include the length of the match, how many times participants will meet and for how long, what participants are and are not allowed to do, the focus of activities, logging procedures, etc.

Thinking in "Modules"

The Mentor Training Manual Template was developed in a "modular" form, and each module covers a specific subject. If you wish, you may create and insert new modules into your program's manual.

It is a good practice to present the modules in the manual in the order that you will be presenting them during the initial mentor training, as it is confusing to trainees when they have to keep jumping back and forth from one section to another.

Because the modules will be addressed in order during the mentor training, the agenda for the training should roughly follow the main headings found in your table of contents.

Time Needed for Initial Mentor Training

The manual in its current form has been set up that so that you can cover all its contents during the initial mentor training. Taking the time noted before each module, the actual estimated training time is a little over three and one-half hours. Adding a warmer exercise and breaks will likely take the training to four to five hours.

Training Exercises and Warmers

This document currently has only two exercises. The first one is in Chapter 3, and it's called "Who Mentored You?" Later, you may want to find and insert other exercises by selecting them from the document entitled "Interactive Exercises for Program Trainers."

The Manual: A Training Tool / Resource Guide

During the initial training, staff should point out to the mentors that the manual serves as both a guide for training and as a reference for questions they may have during the mentoring cycle.

From the Broad to Particular, and Training Rhythm

As you look through the manual, you will see that the topics begin by going from the rather broad (e.g., "History of Mentoring"), to the specific ("Mission, Goals and Objectives," etc.). An effort has also been made to alternate the "rhythm", of the manual and training. What this means is that didactic or lecture sections are interspersed with interactive exercises.

For this reason, near the front of the manual you will find a module entitled "Chapter 2: Brief Program Overview." Care was taken to make the description "brief" to reduce lecturing early on in the training. "Chapter 3: Mentoring Concepts and Practices" is an attempt to become more lively and interactive before going into "Chapter 4: Policies and Procedures," which tends to be relatively lengthy in its presentation.

This author has delivered a number of mentor trainings that have a similar content and tempo as the one in this manual, and participants have evaluated their training experience as generally positive.

About the Table of Contents

You should consider the Table of Contents as it now exists in the Template as a starting point. While in the process of developing your training manual, you may decide to rearrange topics or even entire sections, and then you'll want to come back and rearrange the table of contents. It is suggested that you redevelop the modules before you arbitrarily reconfigure the table of contents.

Table of Contents

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- Mentees
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Chapter 1: Introduction to Mentoring

The purpose of this first chapter is to provide mentors with a starting point to begin thinking about their mentoring relationship. Primarily it gives a historical context, then it focuses on the definition of a mentor. This chapter also briefly describes other Child Welfare Worker mentoring efforts.

In terms of manual development, this chapter should be thought of as a "standard" section, as the history of mentoring, definition of a mentor, etc., are not "program specific."

While creating your Mentor Training Manual, you may want to review this section briefly, then come back to it at a later time, after you have developed your program specific areas.

This module should take approximately 25 minutes to present during the initial training

CHAPTER 1: INTRODUCTION TO MENTORING

Chapter Subjects

- Definition of a Mentor
- Mentoring vs. Coaching
- History of Mentoring
- The Development of "Formal" Mentoring
- The Advent of Business-Based Mentoring
- Social Worker/ Child Welfare Worker Mentoring Programs
- Various Program Models

Definition of a Mentor

Throughout the ages, the term "mentor" has been used to describe a caring individual who forms a relationship with a less experienced person during a time in their life when they are facing challenges. The mentor, a source of guidance and support, is often considered a wise and trusted friend.

A good mentor understands that the focus of the match and the focus of all the activities should be on the mentee. The purpose of the relationship is to promote the growth and the development of the mentee.

**A mentor is a wise and trusted friend.
A mentor is also “other-centered”—his or her focus
is on the growth and development of the mentee.**

That's why mentoring works—the mentee believes that the relationship is primarily about him or her, not about the success of the organization, and not about bringing in dollars.

To that end, mentors also recognize the primary emphasis is on the “relationship.” This is not to say that mentors can't concentrate on building skills; they certainly can. That's part of mentoring, too. But good mentors strive first to make the “personal connection” before getting down to business.

Mentors are non-directive.

True mentoring is also “non-directive.” Successful mentors teach their mentees the “problem-solving process,” rather than to merely give them the answer to a particular problem. At times the mentor may even allow their mentee to stumble a little while trying to accomplish a particular task, so that the mentee may learn a valuable lesson.

Mentoring vs. Coaching

In the business and professional world the words “mentor” and “coach” often seem to be used interchangeably, but there are differences. Coaching is usually short term, and the coach typically focuses on helping the worker to build skills or to complete a specific project. Coaching has more to do with the organization's productivity than helping the employee to prosper. In contrast, mentoring is long term, and the emphasis is on supporting the development of the mentee.

“Often mentoring gets confused with coaching because one of the functions of a mentor is to coach the protégé or mentee. But whereas mentoring uses many of the same techniques as coaching, mentoring involves *going above and beyond*. It is a relationship in which you do more than train the employee to do his job well. Rather, your focus is to share your experience, wisdom and political savvy....” (Stone, 1999)

History of Mentoring

The first record of mentoring comes from Homer's classic work, *The Odyssey*. As the adventurer is about to depart on a 10-year journey, Odysseus leaves his son Telemachus with a servant, Mentor. In the absence of the father, Mentor's role was to guide and inspire Telemachus as the youngster prepared himself for his future task as the ruler of Ithaca.

In the Middle Ages, mentoring occurred when accomplished merchants, metalworkers, and even farmers took on young people to teach them their trade. Up until the Industrial Revolution, most mentoring was “spontaneous” or “informal.” In other words, mentors and mentees somehow found each other. This relationship was often called an “apprenticeship.”

Because of a number of factors (e.g., specialization of vocations, mobility gained through modern transportation, the breakdown of the nuclear family), “spontaneous” mentoring has suffered a marked decline within our society.

The Development of “Formal” Mentoring

In our recent past, most mentoring relationships were “informal.” That is, they occurred spontaneously, without the aid of an organizational structure. In the last decade, a great number of formal or structured mentoring programs have been implemented.

In formal mentoring programs, participants are supported every step of the way so that nothing is left to chance. If you talk to mentors and mentees in an organized, well-run program, they will tell you that the program structure doesn't stifle them. Conversely, it allows them more freedom in the match, as they know exactly what they are allowed to do.

Formal programs are implemented by way of a set of carefully thought out operational guidelines. These programs also have trained staff that see to that the rules of the program are followed, and that everyone is getting along.

Many programs (including the CWWMP) follow a set of industry-accepted best practices that focus in on programmatic areas such as: long-range plan; recruiting plan; orientation; screening; training; matching; monitoring; support, recognition and retention; closure, and evaluation.

The Advent of Business-Based Mentoring

Recently, many organized mentoring programs have been focused on youth, but mentoring has also recently spread to the business world. Formal business-based mentoring programs began to increase in numbers near the end of the 1970's.

The original purpose of these programs was to increase career opportunities for women and minorities, but business mentoring programs today tend to make mentoring available to employees regardless of gender or ethnicity. Mentoring is being rediscovered as a tool that can help to make positive changes within individuals and the environment in which they work.

Social Worker / Child Welfare Worker Mentoring Programs

Although informal efforts are very common, formal mentoring programs for new child welfare workers are still relatively rare. In fact, one can say that structured Child Welfare Mentoring Programs are still in the "pioneer stage." There are very few organized mentoring programs that match experienced social workers with new child welfare workers.

In California to date, although several "*supervisor* mentoring programs" have been located, only two formalized child welfare worker mentoring programs have been identified.

Orange County Social Service Agency Children and Family Services Mentoring Program is a "formal / volunteer" effort. This program has been running for several years, with approximately 100 mentees currently. Roughly half those matches serve new child welfare workers; most of the other matches are for social workers who want to become supervisors. The Program Coordinator indicates that within the agency, the mentoring program is considered to be very successful.

The Central California Child Welfare Training Academy has developed a program called the Merced Peer Mentoring Program. This undertaking is a "formal / paid" mentoring effort, where one mentor works with seven new child welfare workers. The program combines classroom study on core competencies at the Central Academy, with interaction with the mentor. The mentor/ mentee interchange includes having the mentor accompany the mentee on home visits. Although the program has not been running for a long time, and only a few child welfare workers mentees have had the benefit of participation, the initial results have been encouraging.

Although few formal programs for social workers and for new child welfare workers exist, the need for such programs is obvious. The lack of staffing at some agencies is presenting a continual crisis. Job burnout is widespread and agencies are seeking out innovative ways to recruit, train, support, and retain quality child welfare workers. The development of formal mentoring programs can be one of the strategies that can help to avert the crisis in recruitment, training, and retention.

Various Program Models

There are several models of child welfare worker mentoring programs, including:

- **Formal Program / Volunteer Mentor**

This is the model that is described in this training manual. One of the benefits of this kind of program is that large numbers of mentees can be served at a relatively low cost. As they are typically one-to-one relationships, common hurdles include the need for ongoing recruitment of a pool of mentors large enough to serve the program's mentees.

- **Formal Program / Paid Mentor**

There are two types of models that have been used in this category.

A. One-to-many. In this model, one or more full-time staff mentors a number of new child welfare workers. The benefits are that the program can choose experienced and dedicated individuals to be full-time mentors. And, as they are compensated, recruiting mentors is not difficult. Providing a salary for mentors can become a major obstacle.

B. One-to-one (or, one-to-a-few). An organization may choose to pay their social workers on an hourly basis to work with one or more mentees. The advantage is that money is a great incentive to inspire social workers to commit to becoming a mentor. Cost of implementing such a program may be a hurdle.

- **Informal Program / Volunteer Mentor**

Informal / Volunteer mentoring is where a mentor volunteers to connect with a new worker, generally without the help of staff or an organized program structure. This kind of mentoring, popular among child welfare workers for many years, has been very successful. Informal / Volunteer mentors embody the true spirit of mentoring. That is, they help others with the knowledge that they will be supporting these individuals while promoting the greater good

Benefits of Child Welfare Worker Mentoring

If the program meets its objectives, many benefits may be provided for mentee, the mentor, and the organization. They include:

Mentee Benefits

- Providing the new child welfare worker with a sense of care and support, while reducing the feelings of isolation;
- Orienting the mentee into the workplace;
- Teaching and reinforcing the core competencies;
- Facilitating awareness of the organizational culture;
- Facilitating an understanding of the main philosophies of social work;
- Strengthening organizational skills;
- Advancing the ability to quickly respond to a variety of problems;
- Improving self-confidence;
- Facilitating an awareness of community and agency resources; and
- Enjoying the rewards inherent in a caring relationship.

Mentor Benefits

- Understanding that participation will enhance the quality of care provided to the individuals and families;

- Providing an alternative career track for experienced workers wanting to become ‘master practitioners’ rather than supervisors or managers;
- Improving leadership skills;
- Increasing self-confidence gained through leadership;
- Enhancing communication and relationship skills;
- Improving problem-solving skills;
- Receiving compensation and / or incentives (if any are given);
- Enjoying the rewards inherent in a caring relationship; and
- Experiencing the personal gratification that is obtained through the act of giving.

Organizational Benefits

- A mentoring program can be used as tool for recruiting and retaining child welfare workers;
- Improving the quality of care provided to individuals and families, and therefore improving outcomes;
- Retaining quality employees by providing an alternative career track for experienced workers who wish to become ‘Master Practitioners’ rather than supervisors or managers;
- Communicating organizational values;
- Increasing organizational loyalty;
- Improving agency communication;
- Formulating, promulgating and reinforcing new ideas and “promising practices” through the mentoring process;
- Creating another venue for the development of leadership; and
- Improving the overall productivity for employees.

Of course, one of the primary benefits of mentoring a new child welfare worker is that he or she will be much better prepared to serve the public. Therefore, the individuals and the families being served will become the main beneficiaries of a quality child welfare worker mentoring effort.

Chapter 2: Child Welfare Worker Mentoring Program

Chapter 2 begins the "program specific" sections, so the information you will develop here should be carefully thought through. These elements will become the guide and foundation for your mentoring program.

Developing the program's Mission, Goals, and Objectives is also a good place for the Design Team to begin working together. Below, we have provided samples of Mission, Goals, and Objectives as a starting point for the Design Team. Additional instructions for working on these items can be found in the "Design Guide, Chapter 2: Determining the Program Design."

The last part of this section, "Brief Program Overview," is intended to give a quick synopsis of the program without going into great detail (and therefore lecturing too much at the beginning of the training). Details regarding the program structure will come later in "Chapter 4: Policies and Procedures."

This module takes approximately 30 minutes to present during the initial training.

CHAPTER 2: CHILD WELFARE WORKER MENTORING PROGRAM

Chapter Subjects

- Mission Statement
- Goals and Objectives
- Brief Program Overview
- Roles / Tasks of the Child Welfare Worker Mentor
- The Role of the Mentee's Supervisor

Sample Mission Statement

The mission of the Child Welfare Workers Mentoring Program is to support new child welfare workers by matching them with experienced social workers who will guide and support them during their entry into their new endeavor, so that they may become more effective in providing quality services to individuals and families.

*** * ***

Program Goals

- These are Sample Goals. Please note that you will be changing timeframes, activities, etc.
- Also, please note that goals are usually broad and general.
- You will probably want to develop a smaller number of goals than exemplified below.
- Regarding the development process, if you can't determine each and every goal right now that's okay. You may want to create a few initial goals, then come back to this section after you have decided more about focus of the match, program activities, etc.

The Goals of the Child Welfare Worker Mentoring Program are to:

1. Assist the mentee to successfully integrate into his or her new vocation as a child welfare worker;
2. Provide the mentee with an orientation of the workplace;
3. Facilitate the mentee's understanding of the Core Curriculum;
4. Promote a "culture of support and learning" within the agency;
5. Provide training staff with another mechanism for reinforcing learning;
- 6 .Provide the mentee with assistance with the critical decisions made at each stage of the Child Welfare process;
- 7 .Guide each mentee as they assess needed areas of improvement, and to support them in making those improvements;
8. Reduce the feelings of isolation for the mentee, while building a sense of teamwork;
9. Advance the mentee's ability to quickly respond to a variety of problems;
10. Help the mentee to become more productive so that s/he will be able to provide quality services to individuals and families.

Program Objectives

- Program objectives are usually specific and often numerical.
- These are sample objectives. Please note that you will be changing timeframes, activities, etc.
- You will probably want to develop fewer objectives than exemplified below.
- Regarding the development process, as with the "goals" section above, if you can't settle on each and every objective right now that's okay. You may want to develop a few objectives, then come back after you have determined the focus of the match, program activities, etc

The Objectives of the Child Welfare Worker Mentoring Program are to:

1. Match each new child welfare worker mentee with an experienced mentor for the first six months of their work experience;
2. Make each mentee's mentor available to them for approximately eight hours per month during the duration of the program.
3. Conduct at least one face-to-face meeting with the mentee, the mentee's direct supervisor and the mentor during the first two weeks of the match;
4. Facilitate the mentee's self-assessment of his or her skills and areas that need improvement by utilizing the Individualized Training Needs Assessment Tool (ITNA) or a similar instrument;
5. Facilitate the mentee's creation of an individualized development plan (IDP), so that the match can identify and track specific learning goals;

6. Assist each mentee to become proficient in the core competencies;
7. Provide mentees with at least eight hours of on-the-job support and supervision by their respective mentor.

Brief Program Overview

An individual known as the Program Coordinator will conduct ongoing program coordination. The Program Coordinator is an experienced social worker who is also knowledgeable in the implementation of the Child Welfare Worker Mentoring Program.

Or, if you have the Program Coordinator's name you can add it to the above paragraph.

Please note that the "variable" requirements or descriptions of the program will be italicized and placed in brackets "[]" below.

The CWWMP will begin this pilot project by making [*ten*] matches. All mentors and mentees will be volunteers. Mentors and mentees will be recruited, screened, trained, and matched by the Program Coordinator. Mentees must provide the program with a letter of nomination by his or her direct supervisor.

The actual number of matches (above) to be discussed in program design process.

All participants will commit to remain in the match for [*six months*]. Mentors and mentees are asked to meet for a total of [*eight hours per month (48 hours total)*].

The length of the match, the form of meetings, the length of each meeting, the activities of the match, etc., will be developed by the Design Team, then inserted into the above section (as well as in other pertinent places in the manual).

Additional requirements: [*Participants will also work together on the core competencies, individualized development plans, and other activities as described later in this manual.*]

The above activities are also to be determined by the Design Team.

Following the enrollment of participants, the initial mentor and mentee trainings will be conducted under the supervision of the Program Coordinator. During these initial trainings, mentors and mentees will be provided with a training manual. The training manual serves as a guide to go through the initial training, as well as a resource, should participants have any questions during the mentoring cycle.

All participants must agree to uphold the CWWMP's policies and procedures described within the training manual, and to sign a participation agreement before the match commences.

Mentors and mentees will also periodically complete a written evaluation in order to foster improvements in the program.

Initial Training Sessions. Before the program begins, each participant will undergo a three-to-four-hour initial training session. This training will include an in-depth explanation of the mentoring program, including program policies and procedures. Mentors and mentees will be trained separately in their respective groups.

Regarding initial training sessions, some programs feel that it's okay to provide shorter trainings or "orientations" for their mentees. Also, some programs train mentors and mentees together.

Matching. Individuals will be matched based on job description, interests, the potential for positive chemistry, as well as geographical location. The Program Coordinator will make the matching decisions. Before a match is finalized, mentees and mentors will be provided an opportunity to express any concerns about the selection of their potential counterpart. Matching may be done directly before or directly after the initial participant trainings.

If you change any of the "matching criteria," be sure to insert changes into the above paragraph.

Monitoring the Matches. The Program Coordinator will monitor the matches in order to help resolve issues, should any arise during the match. The monitoring process is also part of "logging," and in addition to the [monthly] logs as described below, mentors and mentees may also contact the Program Coordinator on an as-needed basis. The phone number of the Program Coordinator is _____. The best time to reach [him or her] is _____. E-mail address is _____.

Fill in the above name(s) and phone number(s), as appropriate. Also, it's a good practice to have logs turned in monthly, but you can request that they be turned in more or less frequently.

Logging. All mentors and mentees will be required to turn in [weekly, bi-weekly or monthly] logs to the Program Coordinator. Logs may be turned in, by email, mail, fax, or in person. Further logging procedures will be described later within this manual.

Fill in the required frequency for turning in logs (above). You may also state that logs may be turned in by mail, e-mail, or FAX, or whatever you decide.

Program Policies and Procedures. All mentors and mentees must agree to uphold the CWWMP policies and procedures. A full listing of program policies and procedures are listed in Chapter 4 of this manual.

Roles / Tasks of the Child Welfare Worker Mentor

The term "mentor" can have as many connotations as the word "friend." There is no one way to be a mentor, nor one clear-cut role or task that defines mentorship.

The child welfare worker mentor roles and tasks may include:

1. Becoming a source of general encouragement and support;
2. Advocating for the new social worker's training needs;
3. Training the mentee on the core competencies;

4. Coaching specific skills and behaviors that are needed to function successfully as a child welfare worker;
5. Evaluating and giving feedback regarding the mentee's observed performances;
6. Being a positive role model;
7. Serving as a confidant who will help the mentee solve problems and conflicts;
8. Guiding and inspiring the mentee through the early stages of his or her new endeavor.

The Role of the Mentee's Supervisor

It is important that the mentee's direct supervisor be included in the program.

- Supporting the match by learning about and endorsing the agency's mentoring program and activities;
- Nominating new workers for the program;
- Meeting with the mentee and mentor early on to negotiate contact and confidentiality agreements, and to identify the mentee's training needs;
- Receiving brief progress reports, and assessing the mentee's ongoing training needs;
- Upholding confidentiality by not using the mentoring relationship as a way of "policing" the mentee.

Chapter 3: Mentoring Concepts and Practices

This section is designed to promote interaction between the trainer and the participants, and between the participants themselves. The learning objectives of this module also include having the mentors understand the qualities and attitudes of a good mentor.

This module can be seen as a "standard" section. That is, you don't have to make changes in it based on the specifics of your program. As with other standard modules, during the design process, you have the option to come back at a later time to make changes.

This module takes approximately 30 minutes to complete at the initial mentor training.

CHAPTER 3: MENTORING CONCEPTS AND PRACTICES

Chapter Subjects

- Who Mentored You? (Exercise)
- Qualities of Good Mentors
- Successful / Unsuccessful Mentor Attitudes
- Realistic and Unrealistic Expectations of Mentors / Mentees

This exercise was inserted into the manual because it is known to have been frequently utilized in initial mentor trainings. If you have an alternative exercise that you are more comfortable with, you may insert it here.

Who Mentored You?

In order to consider the positive qualities of mentors, please contemplate the following points:

Visualization Exercise:
WHO MENTORED YOU?

1. Who was a good mentor in your life?
2. What did they do for you?
3. What qualities did they have that were important to you?

Qualities of Good Mentors:

List the qualities that your mentor and other good mentors have (e.g., patience, a nonjudgmental attitude, etc.)

Your list may include some of the following traits of good mentors:

- Flexible
- Patient
- Good listeners
- Respectful
- Accepting
- Trustworthy
- Caring
- Open
- Non-directive
- Inspirational
- Hopeful
- Non-judgmental
- Good role model
- Encourage belief in the mentee's ability
- Focus on the growth and development of the mentee

Program may choose to insert additional qualities above (and/ or to delete some qualities).

Successful Mentor Attitudes

Research has shown that the most important element within the mentoring relationship is the attitude of the mentor. An organization called Public/Private Ventures conducted a study and found that the successful mentors begin by trying to develop a relationship of trust and respect with their mentee.

THE SUCCESSFUL MENTOR ATTITUDE:

I wish to develop a relationship of trust and respect with my mentee.

■ * *

Successful Mentors:

1. Involve the mentee in deciding how the pair will spend time together.
2. Make a commitment to being consistent and dependable.
3. Takes much of the responsibility for keeping the relationship going.
4. Respect the mentee's viewpoint.
5. If problems arise, they seek and utilize the help and advice from program staff.

Unsuccessful Mentor Attitudes

The same Public/Private Ventures study described unsuccessful mentors as having a “prescriptive attitude.” That is, they were mentors who had high expectations for immediate change with their mentees. Prescriptive mentors push too hard, too fast, presuming that they are the missing ingredient, the quick fix, the prescription or pill that can bring about immediate changes in their mentees. These unsuccessful mentors fail to consider that mentoring is about the mentee—not about the mentor.

THE UNSUCCESSFUL MENTOR ATTITUDE (PRESCRIPTIVE):

I believe that I am the prescription or pill that will bring about immediate changes in my mentee.

* * *

Unsuccessful, or Prescriptive Mentors:

1. Attempt to transform the mentee, take an authoritative stance.
2. Emphasize behavior changes over the development of mutual trust and respect in the relationship.
3. Have difficulty meeting with their mentee on a regular and consistent basis.
4. Attempt to instill a value system counter to the mentee's values.
5. Ignore the advice of program staff about how to respond to difficulties in the match.

(The above materials adapted from "Mentoring: A Synthesis of P/PV's Research: 1988-1995," Cynthia L. Sipe)

Realistic and Unrealistic Expectations of the Mentor

As previously stated, good mentoring begins with the fostering of a supportive attitude, one that focuses on the growth and development of the mentee. At the beginning of the match, it is helpful to look at your preconceptions for the relationship. A mentor's unrealistic expectations can leave both mentor and mentee frustrated and disillusioned. Maintaining a realistic perspective reduces stress, and it helps the mentoring process to proceed smoothly.

Unrealistic: My mentee's professional success is dependent upon the mentoring process.

Realistic: Even though I will go to great lengths to be of assistance, my mentee's professional success is dependent on his/her own choices and behaviors.

* * *

Unrealistic: My mentee will surely make changes in his/her behavior after speaking with me a few times.

Realistic: It will most likely take time for the mentee to make significant changes (if at all). I should not expect someone to transform because I have spent a few hours with him or her.

* * *

Unrealistic: If my mentee's behavior does not change immediately, it's proof that nothing is happening.

Realistic: My mentee may not appear to be benefiting from the relationship, but that does not mean that they are not getting something good out of it. As a mentor, I must consider that the process of mentoring is "planting seeds" that may take hold at a later time.

* * *

Unrealistic: If I do not see an extensive change in my mentee's functioning, it's a negative reflection on me.

Realistic: Not seeing changes in my mentee does not mean that I have been unsuccessful as a mentor. Again, positive changes take time. And besides, mentoring is not a contest, and it is not about me.

* * *

Unrealistic: I need to be a perfect, "mistake-proof" mentor.

Realistic: It is okay to make mistakes as a mentor. I may take the wrong approach, or say things the wrong way from time to time, but my mentee will be resilient as long as they know I have their best interests at heart.

Realistic and Unrealistic Expectations of the Mentee

It's also helpful for mentees to look at their hopes for the outcome of the match in order to make sure that their expectations are realistic. As a mentor, it's beneficial for you to look at these unrealistic expectations so that you might deal with them if they come up during the match.

Unrealistic: I will automatically be promoted should I complete the mentoring program.

Realistic: Completion of the mentoring program may be helpful to my career, but there is no guarantee that I will be promoted.

* * *

Unrealistic: My mentor will be able to help me solve any career development issues or problems that I may encounter.

Realistic: At best, my mentor will assist me by providing pertinent information or by helping me evaluate a specific problem I may be having. I shouldn't count on my mentor to solve my problems.

* * *

Unrealistic: I can confide with and get help from my mentor with any of my personal problems.

Realistic: The Child Welfare Worker Mentoring Program is geared to respond to professional development issues, not personal problems.

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The Design Team may wish to add their own version of unrealistic and realistic expectations for mentors and mentees.

Chapter 4: Program Policies and Procedures

The purpose of this chapter is to give an overview of the commitments required, policies and the procedures, and rules of the program, so that everyone will be on the same page.

The majority of this module will be specific to your program, so a relatively considerable amount of time must be taken to discuss and to think through this section.

The Mentor Participation Agreement (as well as the Mentee Participation Agreement) features a one-page document that summarizes program rules. As the facilitator reads and discusses each point on this document, mentors will be following along and be able to ask questions to clarify various elements.

Some of the points within the Mentor Participation Agreement will be discussed in detail later on in the manual. These points can be readily identified, as they say, for example, "I agree to abide by the rules of confidentiality as noted in this manual." Referring to the specific policy within the manual is useful, as it is a way of getting the participant to pledge to the policy without having them sign below the full description of the particular item.

Prior to the training, the Program Coordinator should make copies of the Mentor Participation Agreement so that s/he can have mentors sign the agreement after the training.

This module takes approximately 60 minutes to complete at the initial mentor training.

CHAPTER 4: PROGRAM POLICIES AND PROCEDURES

Chapter Subjects

- Mentor Participation Agreement
- Mentee Participation Agreement
- Contact Requirements for Mentors and Mentees
- No-fault Termination Policy and Reassignment
- Confidentiality in the Mentee / Mentor Relationship
- Confidentiality and the Mentee's Supervisor
- Boundary Issues
- Logging Procedures

Participation Agreements

Please give this section of the training your full attention, because at the end of today's session, you will be asked to sign a Mentor Participation Agreement. This agreement outlines the rules, commitments and the program's expectations for you as a mentor.

Please also note that some of the bulleted policies within the Mentor Participation Agreement below can be found elsewhere in the manual, and they will be more fully described before the end of today's training.

Should you have any questions as the facilitator reads through and discusses these items, please don't hesitate to speak up.

Also, if any questions or concerns come up for you during the mentoring cycle regarding the rules of the program, you may return to this section of the manual and review. If you have any questions that aren't clarified by revisiting the policies and procedures, please don't hesitate to call the Program Coordinator.

The policies and procedures that you develop will be specific to your program. Please go through and make the appropriate changes.

Mentor Participation Agreement

As a Mentor I Will:

- Vouch that I am social worker in good standing;
- Commit to meet with my mentee once a week for two hours per week for a six-month period (for a total of 48 hours) basis *[or other time frame agreed upon by the Design Team]*;
- Commit to accompanying my mentee on casework calls for eight of those 48 hours;
- Commit to developing a mentee-focused relationship of trust and respect;
- Agree to meet with the mentee and the mentee's supervisor early on in the match to negotiate contact and confidentiality agreements with the supervisor.
- Agree to discuss the mentee's training needs with the mentee's supervisor, while upholding the negotiated confidentiality agreement;
- Prior to the meeting my mentee and the mentee's supervisor, I will discuss with my mentee his or her "comfort level" regarding confidentiality with the supervisor, so that I can advocate for him / her at that meeting.
- Maintain rules of confidentiality and reporting as noted in this manual;
- Agree to uphold the policies on boundary issues, as noted in this manual;
- Fully participate in and complete the mentor training;
- Commit to attending any other required mentor training sessions as outlined in this manual;
- Arrange for back-up coverage on the days that I am scheduled for training;
- Commit to make up any mentor training sessions or roundtables that I miss (by contacting the Program Coordinator and making the proper arrangements);
- Notify my mentee and the Program Coordinator should any circumstances prevent me from fulfilling my agreement;
- Commit to turning in my mentor log to the Program Coordinator on a monthly basis *[or other timeframe]* ;
- Agree to notify the Program Coordinator if any difficulties arise in the match or if match is terminated;
- Elevate feedback to mentee's supervisor, as needed;
- Sign and uphold the Mentor Participation Agreement.

For the valuable consideration of being able to participate in the mentoring program, I do hereby agree to uphold the policies and procedures of the Child Welfare Worker Mentoring Program, as listed above.

"Valuable consideration" for both parties is needed to make a contract binding. You might choose to leave the sentence above as is, or you could decide to include incentives if the program is providing any. For example: "For the valuable consideration of being able to participate in the program, and for being able to substitute mentoring hours for work hours, I hereby agree to..."

Signed _____

Date _____

* * *

We also provide the mentors with a copy of the "Mentee Participation Agreement" so that you will also know what your counterpart's commitment is. Please note that the "Mentee Participation Agreement" is almost identical to the "Mentor Participation Agreement."

You might consider leaving out this section of the Mentor training Manual until you have fully developed the Mentee Training Manual, along with all of the appropriate policies and procedures. Or, if you feel like you have all the mentee policies and procedures in place, you can leave it in.

Mentee Participation Agreement

As a Mentee I Will:

- Commit to meet with my mentor once a week for two hours per week for a six-month period;
- Maintain rules of confidentiality and reporting as noted in this manual;
- Agree to uphold the policies on boundary issues, as noted in this manual;
- Fully participate in and complete the mentee training;
- Commit to attend any other mandatory mentee training sessions as required by the program;
- Agree to meet with my mentor and my direct supervisor early on in the match to negotiate contact and confidentiality agreements with the supervisor;
- Prior to the meeting my mentor and my supervisor, I will discuss my "comfort level" regarding confidentiality with my supervisor, so that my mentor can advocate for me at that meeting;
- Commit to make up any mentee training sessions that I miss (by contacting the Program Coordinator and making the proper arrangements);
- Notify my mentor and the Program Coordinator should any circumstances prevent me from fulfilling my agreement;
- Commit to turning my mentee log to the Program Coordinator on a monthly basis;
- Agree to notify the Program Coordinator if any difficulties arise in the match or if match is terminated;

- Elevate feedback to my supervisor, as needed;
- Sign and uphold the Mentee Participation Agreement.

For the valuable consideration of being able to participate in the mentoring program, I do hereby agree to uphold the policies and procedures of the Child Welfare Worker Mentoring Program, as listed above.

Signed _____

Date _____

The Design Team should determine all of the contract requirements below.

Contact Requirements for Mentors and Mentees

Requirements for the First Contact

1. First phone contact: It is the *mentor's* responsibility to initiate the first contact by calling the mentee.
2. While on that first phone call, introduce yourself and try to get to know your mentee. Then make plans to meet for the first face-to-face meeting. Before hanging up, verify that the mentee has and will be bringing mentoring program materials to that meeting (such as the ITNA). Also ask your Mentee to bring the Mentee Training Manual.
3. First face-to-face contact: Bring your Mentor Training Manual to the first meeting. Begin the session by trying to make your mentee feel comfortable. The best way to do this is to make small talk.
4. During the first face-to-face meeting, mentor and mentee should discuss any rules / guidelines of the mentoring program that they may have questions or concerns about. (Review manual if necessary.)
5. Before ending the meeting, focus on the ITNA or IDP (to begin concentrating on training needs). If the mentee wishes, discuss any specific items on the plan.
6. Discuss the confidentiality of your relationship, in general, and as it pertains to the mentee's supervisor. Try to come to an agreement regarding the types of disclosure you are both comfortable with, to include disclosure with the mentee's supervisor. (Review the "Confidentiality and Logging" sections, if you need to do so.)
7. Quickly review the areas covered today, and the areas that you are planning to cover next time.
8. Schedule your next contact. Discuss where you will meet, for how long, and what you will work on.
9. If you haven't done so already, determine who will take the lead on scheduling a three-way meeting with the mentee's supervisor, so that you can negotiate the "Supervisor's Contact and Confidentiality Agreement."

Subsequent Contacts:

Although the initial contact for the first meeting should be done by the mentor, later contact can be initiated by the mentor or mentee (as decided by the participants). It is the responsibility of both the mentor and the mentee to keep the relationship going.

Frequency and Form of Contacts

Frequency of contact during the mentoring cycle: As previously stated, during the six-month program cycle, mentors and mentees should spend approximately two hours per week together, for a total of 48 hours. Eight of those 48 hours should include the mentor accompanying the mentee out on casework.

Again, the Design Team will develop the "Frequency and Form of Contacts," plus the specific activities the match will be involved in.

No-fault Termination Policy

Participants need to initially try to work through any conflicts, but if they are unable to do so they should be able to terminate the match without blame or guilt. It would make everyone uncomfortable if participants had to prove "due cause" to terminate the match. The "no-fault" policy and termination procedures is as follows:

The CWWMP understands that there are potentially many reasons why a mentoring relationship may not work out. We want to make it clear that the staff or organization will not try to place blame or fault on any individual requesting termination, or on any individual who was a party to a match that was terminated.

The Process of Termination

The procedure for terminating the match before the six-month commitment is concluded is as follows:

1. The concerned mentor or mentee contacts the Program Manager with an issue that is causing them to consider early termination of the match.
2. If a remedy seems possible, the Program Manager will discuss the situation with both parties and try to help them resolve the issue.
3. If the issue appears to be extremely difficult, the Program Manager will discuss it with the Mentor Program Advisory Committee. If possible, a plan of action will be devised whereby they will attempt to resolve the problem.
4. If necessary, the Program Manager will deem the match terminated, and s/he will do so without placing fault on any individual.
5. All appropriate parties will be notified that the match has been terminated.

Reassignment

After Promotion / Transfer

It may be appropriate to identify a new counterpart if either counterpart is transferred to another job description of region. If the mentee is transferred, he or she may request the program to

identify a new mentor who has experience in the mentee's new area. The Program Manger will be available for consultation regarding this process.

After Early Termination

In the case of an early termination for any reason, it is possible that the mentor or mentee could be reassigned to another counterpart, if they so desire, and if the Program Coordinator believes it is appropriate.

Please note that the CWWMP has a policy of implementing a brief “hiatus”—essentially, a period of non-participation before reassignment.

All of the below confidentiality policies should be determined by the Design Team.

Confidentiality and the Mentee / Mentor Relationship

The primary purpose of this mentoring program is to have the mentor provide support and guidance to the mentee, as the mentee learns more about his or her new career. To promote trust within the relationship, the program asks the mentor and mentee to negotiate a verbal confidentiality agreement between each other. We suggest that the general guidelines be as follows:

- **Talking to Program Staff:** Because it is program staff's job to monitor and support the match by understanding the dynamics of the relationship, either party can reveal anything about his or her counterpart to program staff. Program staff will keep this information confidential, unless it severely impacts either the mentor's or mentee's ability to complete their duties (only then will they advance this information to the appropriate level).
- **Focus of the Mentoring Sessions:** The focus of the match shall be primarily on the mentee's career growth and development. This means that the match should not discuss deep personal issues of either party.
- **Agreeing on Information-Specific Confidentiality:** Should either party have a question about the confidentiality of specific information that they are hearing from their counterpart, they should then ask their counterpart if this is information that should be kept confidential.
- **The Mentor Seeks Outside Resources:** Should the mentee confide in a the mentor that s/he has a particular problem, and the mentor needs to talk about this problem with others in order to help find the answer or locate resources, the mentor will ask the mentee if it's okay to reveal his or her name during this outreach.

Please Discuss These Issues of Mentee / Mentor Confidentiality at the First Face-to-Face Meeting to Come to a Tentative Agreement.

The Design Team should consider changing any of the confidentiality policies as they see fit.

Confidentiality and Mentee's Supervisor

This area is critical, and the Design Team should take great care in determining the program's confidentiality policies. Some programs feel that they want to strictly limit the mentor's communication with the mentee's supervisor, so that the mentee can feel like s/he can be fully open with their mentor. This would be in line with the "true spirit of mentoring," which is to focus on the growth and development of the mentee, and not to be a policing agent for the organization.

Still some organizations may wish to have frequent and open communication between the mentor, the mentee, and the mentee's supervisor. There are pros and cons to each extreme.

Below is a sample Confidentiality Policy. The Design Team should discuss and craft their own statement based on the needs of the mentee and of the organization.

As a program participant, you are obligated to share with the Program Coordinator (or you counterpart's direct supervisor, or appropriate administrative contact) any information revealed by the counterpart that could severely impact the counterpart's ability to perform their job.

If you wish, you may insert your agency's reporting policy here.

Beyond issues that are reportable, the mentee, the mentor, and the mentee's supervisor should try to meet as early on in the match as possible to negotiate a confidentiality agreement between the three parties.

When negotiating this confidentiality agreement, keep in mind that it is not the mentor's job to police or to report, but rather to support and guide the mentee. If the mentor is asked to make reports to the supervisor that put the mentee in a negative light, then the mentee will lose trust with the mentor, and the mentoring relationship will fail.

Beyond issues that are reportable, the mentee, the mentor and the mentee's supervisor should try to meet as early on in the match as possible to negotiate a confidentiality agreement between the three parties.

When negotiating this confidentiality agreement, keep in mind that it is not the mentor's job to police or to report, but rather to support and guide you, the mentee. If the mentor is asked to make reports to the supervisor that put the mentee in a negative light, then you will lose trust with the mentor, and the mentoring relationship will fail. (This same caution was provided in the Mentor Training Manual.

Therefore, you, the mentee and the mentee's supervisor need to negotiate a confidentiality agreement whereby the three of you will be able to discuss the mentee's training needs, but at the same time this agreement has to protect the mentee from a breach of confidentiality.

Below is a sample "Mentee, Mentor, and Mentee's Supervisor Contact and Confidentiality Agreement." This agreement can also be found in the addendum of this manual.

You and the mentee should meet earlier to discuss the confidentiality agreement before meeting with the supervisor. It's best if you and the mentee come to an understanding regarding what he or she is comfortable with regarding your disclosure and interaction with the supervisor. As the mentor, you may need to advocate for your mentee's position on confidentiality during the three-way meeting.

You and your mentee should print up the sample agreement and go over it so that you can craft a version of the agreement acceptable to each other. If changes are made, one of you can make the revisions and send the results to the counterpart.

If you both decide to do so, the draft can then be sent to the mentee's supervisor for review prior to the three-way meeting. Let the supervisor know that this is a working document, and that you both want his or her input, and that changes can be made during the three-way meeting.

(Hopefully, administration has already asked supervisors to support the program, and someone has given the mentee's supervisor an orientation of the program, to include ways they can support the match.)

Mentee, Mentor, and Mentee's Supervisor Contact & Confidentiality Agreement (Sample)

All parties (mentee, mentor, and mentee's supervisor) agree that it is the mentor's role not to police and report, but to support and guide the mentee. Also, within the context of the mentoring relationship, it is the supervisor's role not to try to draw out negative information from the mentee's mentor, but rather to support the match by communicating his or her current perceptions of the mentee's training needs. Therefore, we (mentee, mentor, and mentee's supervisor) agree to abide by the following policies:

As a Mentee I Agree to:

- Report any information that may severely impact the mentor's ability to complete his or her job to the mentor's supervisor, or to elevate the concern to the appropriate level within the organization as dictated by normal workplace policies and procedures.
- Keep confidential any conversations between the mentor and myself unless it falls under the "severe impact" rule.
- Meet with my mentor and my supervisor "X" times during the mentoring cycle to discuss my progress and training needs. *This could be once to start the match, or once a month, once every two months--whatever the supervisor will agree on.*
- *There could also be confidentiality / contact description here regarding the mentor's contact with the supervisor, e.g., "Consent to my mentor e-mailing my supervisor twice a month with a brief progress note and a plan for the next two weeks training, and I understand that my mentor will cc the e-mail to me."*
- Discuss with my mentor any concerns or questions that I might have about confidentiality.
- Discuss with the Program Manager, any problems, concerns or questions that I might have about confidentiality.

For the valuable consideration of being able to participate in the mentoring program, I do hereby agree to the above policies and procedures.

Signed

Date

As a Mentor I Agree to:

- Report any information that may severely impact the mentee's ability to complete his or her job to the mentee's supervisor, or to elevate the concern to the appropriate level within the organization as dictated by normal workplace policies and procedures.
- Keep confidential any conversations between the mentee and myself unless it falls under the "severe impact" rule.
- Not allow the mentee's supervisor to draw out any negative information about the mentee beyond the "severe impact" rule.
- Communicate the mentee's training needs to the mentee's supervisor without being negative., e.g., "It's my perception that the mentee needs to focus on writing reports."
- Meet with the mentee and the mentee's supervisor "X" times during the mentoring cycle to discuss the mentee's progress and training needs. *This could be once to start the match, or once a month, once every two months--whatever the supervisor will agree on.*
- *There could also be confidentiality / contact description here regarding the mentor's contact with the supervisor, e.g., "E-mail the mentee's supervisor twice a month with a brief progress note and a plan for the next two week's training, and cc this e-mail to the mentee."*

About Boundaries In General

Establishing good boundaries is necessary when working in a mentor / mentee relationship. Boundary issues may never come up between you and your mentee, but it's good to discuss them during the training so that everyone will fully understand the program's rules regarding what is and isn't acceptable.

Loaning Money, Gift Giving, Giving Favors

Loaning and/or giving your counterpart money, gifts, or favors is against program policy, as this creates a dual relationship. The exchange of assets and favors can skew the relationship, and it also sets the stage for manipulation.

Phone Contact

Each participant should respect their counterpart by coming to an agreement early on in the match as to how often to call, and where and when it's okay to call.

Frequency and Length of Meetings

The times set forth in this manual on the frequency and length of participant meetings are guidelines. Both the mentor and mentee should be respectful of each other's time. If your mentee goes beyond the time parameters laid down by the program you may want to remind them of the program's guidelines.

Loaning Money, Gift Giving, Giving Favors

Loaning and/or giving your counterpart money, gifts or favors is against program policy, as this creates a dual relationship. The exchange of assets and favors can skew the relationship, and it can also set the stage for manipulation.

The following two items, "Depth of Sharing" and "Good Boundaries Means Dual Respect," can be thought of as "standard" areas, so you don't have to change them unless something strikes you beyond what is presented below.

Depth of Sharing

We cover this in "communication skills," but as a reminder, the depth you choose to share your personal life with the mentee is also a boundary issue. If you feel uncomfortable about sharing, hold back. For further clarification contact the Program Coordinator. Conversely, be respectful and don't delve deeply into your mentee's personal life.

Good Boundaries Means Dual Respect

You can help your mentee's development by honoring their boundaries. You should also ask them if it's okay to pose a difficult question, for permission to seek advice from another individual (if s/he has a problem that you have no ready strategies). In addition, you should also ask your mentee if it's okay to reveal their identity if you are seeking advice on their behalf. If you are unclear on a particular issue discuss it with your mentee in order to come to an agreement.

Logging Procedures are "program specific" in nature. The Design Team will make changes on the requirements listed below.

Logging Procedures

There are two logging requirements for mentors on the CWWMP.

Submitting a Log to the Program Coordinator

A brief log (see *Mentoring Contact Log* in “Program Forms” section) must be submitted by e-mail, in person, or by fax or mail to the Program Coordinator by *both the mentor and the mentee* according to the following schedule:

1. Within one week after the first contact has been made;
2. After the second week of the match; and
3. At the end of each month (starting with week 6 of the match).

Note: Because of time constraints, the Program Coordinator will only make contact with participants if they have failed to send in the log in a timely manner.

As a reminder, if you have an issue or conflict regarding your counterpart or the mentoring program in general, you may call or contact the Program Coordinator at any time.

Submitting a Progress Note to the Mentee's Direct Supervisor

At the end of each month, as you turn in your Mentor Log to the Program Coordinator via email, you will also be required to write a short email to the mentee's supervisor (with a cc to your mentee).

Essentially a very brief progress note, the email will inform the supervisor of the current focus of the activities for the match, as well as the mentee's progress at mastering various tasks. You should also describe the next activity you will be working on.

In the email you will also ask the supervisor if there are any areas of concern that they would like you to work on with the mentee on.

You will also request that the supervisor cc his response to the mentee. If s/he doesn't you will forward the supervisor's response to the mentee.

Your progress report e-mail to the supervisor might look like this:

Date

Hi Jim,

Here is this month's brief progress note on my work with Larry Smith:

We are currently working on Larry's interviewing skills. As we discussed previously, he has always done well at interviewing adults, and this month Larry has made a great deal of headway on interviewing children.

Specifically, he has learned to slow down when talking with them, and he has also toned down his voice so that they feel that he is more on a level with them. In

addition, I feel that Larry is getting a better sense of the wide variety of tasks that child welfare workers need to master.

Next month the plan is to work on writing reports.

Are there any areas that you would like Larry and me to focus on?

Sincerely,

Mike Mentor

P.S. Please cc Larry with your response.

Chapter 5: Communication Skills

Most social workers have had extensive training on communication skills, so this area will likely be a refresher course for them. Our aim with this module is to talk briefly about trust and respect, remind mentors of four "communication tools," and then discuss two more areas of concern. We feel that if you keep things brief then the trainees will actually have a chance to remember some of the points covered.

This is a "standard" area within the mentor training manual, so you don't have to change this section unless you want to do so.

This module takes approximately 40 minutes to complete at the initial mentor training.

CHAPTER 5: COMMUNICATION SKILLS

Chapter Subjects

- The Role of Trust and Respect within Communication
- Active Listening
- Non-Directive Approach
- Open-ended Questions
- Paraphrasing
- Other Communication Concerns: Disclosure / Difficult Subjects
- Good Conversations / Bad Conversations (Exercise)

The Role of Trust and Respect within Communication

As a social worker, you will most likely have had a great deal of training and practice on "communication skills." Therefore, this chapter will most likely be a refresher course, reminding you what you already know, and how those skills relate to being a mentor.

True mentoring is "other-centered," that is, the focus is always on the support and development of the mentee. Whereas "friendship" is a give and take situation, and "coaching" is a means of problem solving for mutual benefit, "mentoring" is an act of service.

Because the mentor is being of service, when interacting and communicating with the mentee, the mentor must consistently respect the mentee by asking him or herself:

In this situation, what is best for the growth and development of the mentee?

The four following communication tools—active listening, non-directive approach, open questions, and paraphrasing—will help you establish a sound foundation of trust and respect for this relationship.

COMMUNICATION TOOL # 1: ACTIVE LISTENING

Active listening means that you make a special effort to genuinely hear what the mentee is saying.

Receive rather than transmit. A good listener usually receives (listens) before they transmit (talks). Remember that the relationship is about the mentee, not the mentor. Do not be like the narcissistic character that Bette Midler played in the movie *Beaches*, who only slowed down enough to say to her friend, “That’s enough about me. What do *you* think about me?”

Bring your full attention to the conversation. Good listeners are able to bring themselves fully to the moment. Of course, sometimes you will be having a rough day. It could be a fight with the spouse, bills to pay, a lack of sleep, or other problems that can prevent you from being able to fully focus on the mentee’s concerns. If you are having a bad day, the best thing to do is to attempt to temporarily switch your frame of mind for the time that you are on the phone with the mentee. If you are having a terrible day and are unable to focus, you should consider asking the mentee (or mentor) if you might reschedule the contact. This technique of agreeing to focus on an important issue at a later time is called “shelving.”

Pay attention to the little things. The mentor should try to discern if there is anything unusual in the mentee’s conversation. Is their voice tense? Do they use words out of context that might give you a clue as to what is going on with them? Does the mentee keep coming back to a specific issue, even though in your mind it does not seem that significant? How is the mood as they attempt to tackle a particular task? Is your mentee a focused individual, or do they often go off on tangents?

As a mentor, you are not expected to be a psychologist or counselor, but it certainly does not hurt to use your own knowledge and your intuition to assess the situation.

COMMUNICATION TOOL # 2: NON-DIRECTIVE APPROACH

*Real motivation comes from within. People have
to be given the freedom to succeed or fail.*

—Gordon Forward
CEO, Chaparral Steel

In the non-directive approach, you do a great deal of listening and asking questions, and you spend only minimal time giving advice.

Remember that a successful mentor places the growth and development of the mentee above helping them solve a particular problem. If you continually tell the mentee what to do, you are failing to create an environment where the mentee can feel empowered. The mentor must have faith that the mentee will eventually make the right decision, even though the “right” answers to a problem may not be immediately apparent.

Remember that one of the definitions of "mentor" is a person who helps the mentee *make up his or her mind*, instead of you being so direct that you make up his or her mind for them.

Please note that if there is an emergency that it's mandatory that you be direct. For example, if the child were getting abused at home you certainly wouldn't want to use this as an opportunity for your mentee to make mistakes.

This manual will cover a problem-solving model later in Chapter 7: "Developing the Relationship."

COMMUNICATION TOOL # 3: OPEN-ENDED QUESTIONS

Using open-ended questions is a good way to get the mentee to talk and to (sometimes) subtly direct them to consider issues or options.

Open-ended questions have nice soft beginnings:

- "I'm wondering if you are doing things this way because that's the way you did them on your last job? Please tell me about...?"
- "I'm not sure, but it occurs to me that you might be feeling overwhelmed. If you don't mind, please give me your thoughts about..."
- "Do you have any ideas why...?"
- "Could you please give me your thoughts and ideas that you may have on the subject of..."

Open questions are best as they "invite" the mentee to talk about what's going on. As they begin to talk they will understand more about what they need to do to make improvements.

Closed Questions: The opposite of an open question is a closed, painfully direct, and even critical question. Examples:

- "Why do you insist on doing it this way?"
- "What were you thinking when you made this report out?"
- "Do you like being wrong all the time?"
- "Do you or do you not want to become a good worker?"

Please note that although the technical definition of an open-ended question is one that can't be answered with a "yes" or "no" and a closed-ended question is the opposite, we believe that it is more about the questioner's attitude than anything else.

For instance, even though the question, "Do you have any ideas about...?" can technically be answered with a "yes" or "no," the spirit of such a question will generally be enough to inspire the mentee to answer in length.

COMMUNICATION TOOL # 4: PARAPHRASING

“It seems to me...”

“It sounds like...”

“I wonder if what you’re are saying is...”

“Correct me if I’m wrong, but...”

The above are some of the lead-ins to paraphrasing. Paraphrasing is the process of repeating what you just heard the mentee say, but in a little different wording:

“Correct me if I’m wrong, but what I think I’m hearing you say is that you've always done it this way in the past, and it's always worked out okay. Is that on target?”

The act of paraphrasing is a demonstration of your respect for the mentee. Paraphrasing shows your mentee that you are taking the time and effort to understand *exactly* what they are trying to get across.

Other Communication Concerns—Disclosure / Difficult Subjects

Disclosure

“How much of my life shall I tell the mentee?” We use three simple rules when it comes to deciding how much the mentor should disclose to the mentee:

A. Be human. It helps the mentee to “normalize their feelings” when they learn your life is not “bullet-proof.” It is important for the mentee to know that you have not done everything perfectly as a social worker.

Being human the wrong way: "Yes, I'm a mess when I go out and make calls on families. The abuse issues really get to me. I literally fall apart half the time. Let me tell you about how I was abused when I was young..."

Being human the right way: "Yes, I too have had trouble calling on families where the parents are abusive. That stuff can still really push my buttons and shake me up. At first those emotions were tough to cope with and sometimes they still are,

but I've learned how to cope with them so that I can get the job done. What I was finally able to do was to..."

B. Do not use the mentoring relationship to try to solve your own problems. If the mentee gives you two minutes of their problems, don't give them ten minutes of yours. The focus should be on the mentee's situation, not your own. Sometimes it feels good to get things off your chest, but mentoring is not the proper venue.

The mentee wants to be mentored or they would not be in the program. If your problems seem overwhelming to the mentee, they may end up mentoring you, and that would be counter to the purpose of the CWWMP.

C. When considering talking about specific subject, first ask yourself about your own motives for disclosing.

<p style="text-align: center;">Is disclosing this particular information for my benefit, or does it benefit the mentee?</p>
--

Difficult Subjects

Mentees also go through training, so it might not ever happen, but as a mentor, you must prepare yourself for the possibility of dealing with difficult or counterproductive subject areas.

For instance, what would you do if a mentee began talking about issues unrelated to the purpose of the mentoring relationship? And what response might you have if the mentee began describing a situation that was counter to your personal values?

One option is that you might listen for a while, but then suggest that the topic is off task, and that it is an issue that is unrelated to the purpose of the mentoring process. Another strategy, one that can sometimes make a mentee aware that s/he is treading on a subject that is off base is to simply say, "I'm wondering why you are wanting to discuss that situation now?"

There is no one right way of dealing with difficult or counterproductive subject areas, but you should think about utilizing one or two responses, should the situation unexpectedly arise.

This communication skills exercise was inserted into the manual because it has proved to be well-received in mentor trainings. The Trainer's Manual provides notes on how to implement this exercise, plus it provides other exercises as options. Of course, if you have an exercise that you are more comfortable with, you may insert it here.

Communication Skills Exercise

"Good Conversations / Bad Conversations"

The person I have the best conversations with is _____.

The reasons that I have good conversations with this person are:

-
-
-
-
-

The person I have the most difficult conversations with is _____
(You don't have to write down the person's name)

The reasons that I have with difficult conversations with this person conversations are

-
-
-
-
-
-

CHAPTER 6: MENTEE LEARNING GOALS

Chapter Subjects:

- Assessing the Mentee's Learning Needs
- Mentor's Training and Support Methods
- Developing the Mentee Action Plan (MAP)

Assessing the Mentee's Learning Needs

One of the best ways to evaluate the mentee's learning needs is by way of the Individualized Training Needs Assessment (ITNA). There are a number of steps that can be taken to utilize the ITNA while working with the mentee depending on the comfort level and the time availability of the mentor. In addition, it is possible that the mentee's supervisor will assist with the ITNA.

1. Mentor explains the use of the ITNA to the mentee.
2. Mentee completes the assessment.
3. Mentor helps mentee to select three competencies, and develop learning objectives for each by using the mentee action plan (MAP.)
4. Mentor and mentee communicate with mentee's supervisor to gain input.
5. If Mentee currently has classroom focus on the module in question, match will meet to discuss subject matter.
6. The pair takes action on a specific learning objective—mentor supports in manner indicated on the MAP.
7. After the effort to complete the learning objective, mentor and mentee meet to discuss outcomes.
8. Outcomes are logged in the MAP, along with future strategies for the same learning objective.
9. After the three learning objectives have been completed, the process starts all over again.

Mentors' Training and Support Methods

There are many methods that a mentor can use to support and reinforce the mentees learning of the core competencies. As a mentor, use your creativity to find the strategies that will be the most impactful to your mentee (while not taking up too much of your time).

Some of the strategies are:

- Discuss classroom core competency work with mentee, and how applies to casework.
- Review individual training needs assessment.
- Assist in developing Mentee Action Plan (MAP).
- Attend three-way meeting with mentee and supervisor.
- Accompany mentee to home visits / court hearings
- Have mentee accompany mentor to same.
- Review case files with mentee.
- Review referrals.
- Conduct role plays.
- Discuss vignettes.
- Attend specialized trainings with mentee.

Developing Mentee Action Plan (MAP)

Now that you have seen how to use the ITNA, and you have reviewed mentor learning strategies, you are ready to develop the MAP. The MAP has five steps. (The actual MAP form is found in the addendum.)

1. Objective (based on ITNA defined need) _____

The objective specified is based on the ITNA. An example goal would be to "improve interviewing skills."

2. Mentor's Support _____

How will the mentor help? Accompanying the mentee on interviews and giving feedback. Having the mentee watch him/her during interview. Conducting role plays / vignettes?

3. Supports and Barriers _____

Are there any other resources available that could assist the mentee? Trainings, literature, other experts, for example? Are there any identifiable barriers to reaching this learning goal?

4. Outcome _____

After the attempt to complete the learning goal, how did the mentee do? What did they do well? What could they have done better on?

5. Next Steps to Reinforce Learning _____

Are there any suggestions for future activities that might help the mentee to reinforce this learning objective?

So, the Mentee Action Plan consists of the five steps listed above. You may develop your own version of the MAP. For instance, you might want to add a step for "Supervisor Involvement / Feedback."

Chapter 7: Developing the Relationship

This module is mostly "program specific," but there are also some standard sections. The Template will note whether the information is "standard" or "program specific" prior to each bullet point.

This module takes approximately 30 minutes to complete at the initial mentor training.

CHAPTER 7: DEVELOPING THE RELATIONSHIP

Chapter Subjects

- Before the Match Commences
- Beginning the Match
- Patience and Maturity
- When to Ask for Help
- Problem Solving Techniques
- Role of Program Coordinator

"Before the Match Commences" has elements that are both standard and program specific. The Design Team should go through and determine if any changes need to be made.

Before the Match Commences

Mentor Prerequisites

Before the match actually begins, all potential **mentors** will have:

- Completed and submitted the Mentor Application and Interest Form;
- Undergone the Mentor Training;
- Reviewed the Mentor Training Manual;
- Signed the Mentor Participation Agreement (after the Mentor Training);
- Been told who their potential mentee is, and they will have approved the match.

Mentee Prerequisites

Before the match actually begins, all potential **mentees** will have:

- Completed and submitted the Mentee Application and Interest Form;
- Undergone the Mentee Training Session
- Reviewed the Mentee Training Manual;
- Signed the Mentee Participation Agreement (after the Mentee Training)
- Been told who their potential mentee is, and they will have approved the match.

"Beginning the Match" is relatively "standard."

Beginning the Match

It is important that the relationship between mentor and mentee get off to a good start. The best way for both parties to have a good beginning is to move forward with a positive attitude.

Participants should also strive to be accountable. “Accountability” means that you follow through with your commitment. If you miss a contact or appointment with your counterpart, get in touch with them right away so that you can apologize and reschedule.

Should you have any concerns about your counterpart during the initial phases of the match, please contact the Program Coordinator as soon as possible.

"Patience and Maturity" is standard.

Patience and Maturity

Have Patience. You and the mentee may hit it off right away, or it might take you a while to get comfortable with each other. Remember that you are trying to build mutual trust and respect, and that usually takes some time.

Be Mature. As the mentor, you are the “container” for the relationship. A mentor who keeps a mature stance does not blame the mentee or put them in a defensive position when difficulties arise in the relationship. As the mentor, it is your responsibility to model the resolution of conflicts in a businesslike, professional manner.

"When to Ask for Help" is mostly standard, although the Design Team may decide to add, delete or to edit some of these points.

When to Ask for Help

The bottom line is to ask for help at *anytime* that you feel uncomfortable about what is going on in the match.

Contact the Program Coordinator:

1. If the dynamics of the match are strained.
2. If your mentee is not keeping appointments.
3. If the mentee tries to take advantage of you by taking up too much of your time, by asking for favors, etc.
4. If the mentee breaks confidentiality.
5. If you have any question or concerns about rules, policies and procedures of the program.
6. If you have concerns about the ethical or professional caliber of your mentee's behavior.
7. If your mentee is breaking any of the program's rules.
8. Anytime you feel uncomfortable about anything going on with your mentee, or if you have questions or concerns about the program.

Problem-Solving Techniques

Give the Mentee Every Opportunity to Solve His or Her Own Problems. In assisting a mentee with difficulties, it is best to help them come up with their own answers. It's the mentor's responsibility to ask questions that helps them to focus on the problem, but handing them the solution outright is usually counterproductive. If you give them the right answer and it works for them, they will know that it was someone else who solved the problem, and they will miss a chance of becoming empowered. If you give them a strategy that doesn't work, they can rationalize that it was someone else's mistake, not their own.

Problem-Solving Model

You may have your own methods of helping people to solve problems, but we have listed a simple model below, and you may wish to consider some of the following points:

Ask the Mentee:

1. What is your specific problem, concern or issue?
2. What remedies have you tried so far, and how have they worked?
3. Have you ever encountered a similar problem? What did you do to try to solve it? How did that work out that time?
4. Do you know of anyone else who has encountered a similar situation? How did they attempt to solve the problem?
5. What do you think you should do?

If The Mentee Has No Viable Strategies:

1. Give them more time to come up with a strategy.
2. Provide them with examples about what others (or you) did in a similar situation. Sometimes stories are great tools; they not only help to paint a picture, but they can give your mentee hope when struggling with an extremely difficult situation.
3. Make concrete suggestions. As previously stated, in a crisis situation it's okay to be direct. For instance, if your mentee has a case where a young person is in immediate danger, you wouldn't go slowly in service of letting your mentee make his or her own decisions. Instead, you would urge your mentee to act!

Dealing With Difficult Problems. If the mentee describes a problem for which you have no suggestions, be honest. Tell them that you will give the problem some more thought, and that you will try to get more information from additional sources to help the two of you.

Role of the Program Coordinator

The Program Coordinator will be the check-in person for mentors and mentees during the six-month mentoring cycle. It will be the responsibility of the mentors and mentees to turn in their logs (in person, by mail, e-mail, or fax) to the Program Coordinator once a month. The Program

Coordinator will only follow up if participants fail to contact them, or if s/he receives a log (or phone call or e-mail message) that indicates there might be a problem.

The Program Coordinator will provide a Mentor Training Manual to the replacement (or back up) if the original mentor or mentee is unable to fulfill his or her duties. If there is not a mentor training scheduled, the Program Coordinator will be available to highlight key components from the Mentor / Mentee Training and to answer questions for the new participant.

If needed, the Program Coordinator will consult with his or her administrators, should difficult problems arise with any match, or with the program in general. The Program Coordinator will also have the discretion to elevate concerns to the mentor/mentee's manager or supervisor, as appropriate. The Program Manager also has the ability to meet with the "Mentoring Program Advisory Team" in order to discuss difficult questions, or to consider revising program policies and procedures.

If you plan on having a "Mentoring Program Advisory Team," here would be the place to describe who they are, how often they meet, their function, etc.

So that improvements can be made in the program, the Program Coordinator will also administer and tabulate "satisfaction surveys" from program participants at prescribed times.

Chapter 7: Program Forms

You may use the standard forms, or you may wish to design your own.

CHAPTER 7: PROGRAM FORMS

- Mentor Interest & Application Form
- Mentee Interest & Application Form
- Mentor /Mentee Contact Log
- Mentor Participation Agreement
- Mentee Participation Agreement
- Mentee Activity Plan (MAP)

Mentor Application and Interest Form

Name _____ Date _____

Work Address _____ Region _____

City and State _____ Zip _____

Phone _____ Fax _____ Email _____

1. How many years have you been a social worker? _____

2. Please provide a brief current job description _____

- Please describe any previous positions you may have had as a social worker.

4. Do you currently supervise staff, if so how many? _____

5. Have you ever been a mentor before? Yes No

If so, where? _____ For how long? _____

Please describe this relationship _____

6. Where do you see your strengths regarding mentoring a relatively new mentee?

7. Please circle your comfort level regarding becoming a mentor

(Low) 1 2 3 4 5 (High)

8. I want to become a mentor because _____

9. List hobbies and interests _____

Mentee Application and Interest Form

Name _____ Date _____

Work Address _____ Region _____

City and State _____ Zip _____

Phone _____ Fax _____ Email _____

1. How many months have you been a child welfare worker? _____

2. Have you ever been a mentee before? Yes No

If so, where? _____ For how long? _____

3. Where do you see as your strengths as a Child Welfare Worker? _____

• Where do you see as your learning needs as a child welfare worker?

• What do you see as the benefits of participating in this mentoring program?

6. List hobbies and interests _____

Contact Log
Child Welfare Worker Mentoring Program

Mentee's Name _____

Mentor's Name _____

I am the Mentee

I am the Mentor

Date and Time of Session _____

Session Type: Face-to-Face Contact Phone E-mail

Learning Needs Discussed During Previous Session:

Learning Needs Discussed Today:

Any Specific Successes or Problems to Report

Status of Individual Development Plan:

Activities for Mentor Before Next Session (including completion dates):

Activities for Mentee Before Next Session (including completion dates):

Date of Next Session: _____

Personal Contact Phone E-mail

Child Welfare Worker Mentoring Program MENTEE ACTION PLAN (MAP)

Mentee's Name _____ Mentor's Name _____ Date _____

Objective 1	Objective 2	Objective 3
Objective (based on ITNA defined need)	Objective (based on ITNA defined need)	Objective (based on ITNA defined need)
Mentor's Support	Mentor's Support	Mentor's Support
Supports and Barriers	Supports and Barriers	Supports and Barriers
Outcome (and date of completion)	Outcome (and date of completion)	Outcome (and date of completion)
Next Steps to Reinforce Learning	Next Steps to Reinforce Learning	Next Steps to Reinforce Learning

Chapter 8: Rosters and Bios

This section is entirely program specific, and the rosters and bios are to be inserted by the Program Manager.

CHAPTER 8: ROSTERS AND BIOS

- Mentees
- Mentors
- Program Staff
- Trainers Bios

MENTEES

[Date]

NAME	REGION/ UNIT	PHONE / EMAIL
Jane R. Doe	Special Services/ Adoptions	(760) 555-5555 Jdoe@dpss.co.ca.us
Etc.		

MENTORS

[Date]

NAME	REGION/ UNIT	PHONE
John Smith	Desert	760-555-1212 <u>jsmith@aol.com</u>
Etc.		

**Child Welfare Worker Mentoring Program
Program Staff**

NAME	TITLE	PHONE/ FAX	EMAIL ADDRESS
Jane Smith	Program Coordinator		
John Doe	Assistant Program Coordinator		

TRAINER BIOS

Mentor Training

John Q. Smith, MA: Mr. Smith is the owner operator of Mentoring Systems, a company that provides technical assistance to...(etc).