CHAPTER 1

Learning

Grounding the Work of Mentoring

LEARNING ON THE PART of both mentor and mentee grounds the work of mentoring. It is the reason we do it, the process we engage in during a mentoring relationship, and the outcome that both mentor and mentee seek. Genuine learning evolves through a process of exploration and discovery. It requires collaboration between the mentoring partners and a safe environment that honors the mentee's integrity and learning style. In this paradigm, mentor and mentee travel a parallel journey.

LEARNING

Mentoring relationships that are not grounded in learning, especially those based on the traditional model of wisdom transmitted from "master" to "apprentice," are not very successful. Let's begin by looking at how these two very different styles of mentoring operate:

Randy and Pat

Randy, a manager in a multinational corporation, had been assigned to mentor Pat, a new employee. Pat was bright, energetic, highly motivated, and eager to make his mark. Their mentoring relationship started out on a positive note, and they developed rapport easily. Anxious to please this high-level executive, Pat worked on Randy's projects and researched whatever topics he assigned; he even carried Randy's briefcase to meetings.

Before long, however, the level of interaction dramatically shifted. Over the weeks and months, Randy's responsibilities increased,

and he had less and less time for Pat. Soon they drifted away from two-way information sharing and discussion to transaction and information giving. There was no time available for raising or answering questions, and their e-mails were brusque and matter of fact.

Pat soon became frustrated. He had learned a great deal by shadowing Randy, but he needed more. What was missing was the opportunity for Pat and Randy to discuss and process the learning that was taking place.

This mentoring model is not unique to the corporate world. There are similar examples in academia, where the mentee is so eager to get ahead that the exposure that comes with "carrying a professor's briefcase" makes the experience worthwhile. In Pat's case, however, that benefit was short term.

Jocelyn, too, had high ambitions and realized that she needed some specific skills to get ahead. She approached Carmon, a high performer and much-admired manager in her organization, to be her mentor. Jocelyn and Carmon's mentoring relationship, collaborative from the beginning, was much more successful.

Carmon and Jocelyn

At their first meeting, Carmon worked with Jocelyn to crystallize her amorphous learning goals. They set ground rules for the relationship and agreed that it would be Jocelyn's responsibility to initiate the contact between them.

Each time they met, Carmon and Jocelyn reviewed the progress they were making toward Jocelyn's learning goals. They also set aside regular time to talk about their levels of satisfaction with their interaction and how each felt things were going.

They had to work through one potential rough spot: Jocelyn was eager to do as much as possible, and she wanted more of Carmon's time than Carmon felt she could spare. Because they had intentionally built time to reflect into their regular meetings, they were able to talk openly and honestly about Jocelyn's concerns. They also identified other areas Jocelyn could explore for learning on her own, including several projects, client meetings, and strategic internal meetings. This gave Jocelyn more ways to approach her goals, and freed Carmon to do her own work.

What made the difference in these two very different examples? Randy and Pat's more traditional mentoring relationship is one-way, with knowledge transmitted from mentor to mentee. Jocelyn's more successful

relationship with Carmon was a collaborative learning partnership in which learning was allowed to flow freely in both directions.

At a deeper level, these two examples illustrate the difference between the old and new paradigms of mentoring. In the more traditional authoritarian teacher–dependent student–supplicant paradigm, a passive mentee is expected to receive and absorb knowledge.

Today mentoring has become collaborative; it is now a mutual discovery process in which both the mentor and mentee have something to bring to the relationship ("the give") and something to gain that broadens each of their perspectives ("the get"). Wisdom is not passed down but discovered and nurtured. This shift frees both partners to learn together.

Creating a Learning Partnership

The collaborative mentoring paradigm you will learn about in this book is rooted in principles and practices of adult learning. Mentor and mentee work together to achieve specific, mutually defined goals that focus on developing the mentee's skills, abilities, knowledge, and thinking; it is in every way a learning partnership.

The learner—in this case, the mentee—plays an active role in the learning, sharing responsibility for the priorities, learning, and resources, and becoming increasingly self-directed in the process. The mentor nurtures and develops the mentee's capacity for self-direction (from dependence to independence to interdependence) over the course of the relationship. Throughout the learning relationship, both mentoring partners share accountability and responsibility for achieving the mentee's learning goals.

Today's mentoring relationships are usually short term: when the learning goals have been accomplished, the relationship comes to closure. If goals have not been achieved by a prearranged deadline or the partners agree on more goals, the mentoring partners are free to review, assess, and renegotiate their relationship.

Elements of the Learning-Centered Mentoring Paradigm

The learning-centered mentoring paradigm has seven critical elements: reciprocity, learning, relationship, partnership, collaboration, mutually defined goals, and development:

1. *Reciprocity*. The presence of reciprocity and mutuality in a mentoring relationship frequently surprises first-time mentors. Each partner has specific responsibilities, contributes to the relationship, and learns from

the other. Both partners say that as a result, their perspectives have expanded and they have gained new knowledge; mentoring is a value-added relationship for them.

2. *Learning*. Without the presence of learning, mentoring doesn't exist. It is the purpose, the process, and the product of a mentoring relationship. That's why it is essential that you understand your mentees as learners and yourself as a learning facilitator. As a mentor, you will need to know how to engage and guide your mentee appropriately and create a climate that supports learning. And you must also be open to learning yourself.
3. *Relationship*. Strong relationships motivate, inspire, and support learning and development. But good mentoring relationships take time to develop and grow. From the beginning, both mentor and mentee must be open and trusting and honor each other's uniqueness. Both partners need to work at establishing, maintaining, and strengthening the relationship through their mentoring time.
4. *Partnership*. A good relationship forms the basis for a strong mentoring partnership. You and your mentee respect one another and are attuned to each other's needs. This will help you establish agreements that are anchored in trust. With a strong partnership, you will both feel secure enough to work at building and strengthening the relationship and to hold yourself and each other accountable for results.
5. *Collaboration*. Partnership is, by definition, collaborative. Together you and your mentee build the relationship, share knowledge, and come to consensus about the focus of the mentee's desired learning; then you actively work together to achieve it.
6. *Mutually defined goals*. Mentoring must flow in the direction of defined goals—otherwise, like a river without a clear channel, your relationship will meander until it dries up. It is vital to clarify and articulate learning goals at the beginning and to review them throughout the mentoring relationship. This means asking questions, listening to answers, and engaging in ongoing conversation to ensure that you select meaningful goals that will guide the work of the relationship.
7. *Development*. Mentoring needs to promote the mentee's development and growth. When development is future directed, it creates its own momentum. As a skilled mentor, you can consciously facilitate movement forward by providing appropriate support, challenge, and "help in anchoring the vision of the potential self."[1] This means helping mentees

to develop the skills, knowledge, abilities, and thinking necessary to achieve their success.

MENTORING BASED ON PRINCIPLES OF ADULT LEARNING

The shift in mentoring practice aligns with basic principles of adult learning first laid out by Malcolm Knowles:[2]

- Adults learn best when they are involved in diagnosing, planning, implementing, and evaluating their own learning.
- The role of the facilitator is to create and maintain a supportive climate that promotes conditions necessary for learning to take place.
- Adult learners have a need to be self-directing.
- Readiness for learning increases when there is a specific need to know.
- Life's reservoir of experience is a primary learning resource; the life experiences of others enrich the learning process.
- Adult learners have an inherent need for immediacy of application.
- Adults respond best to learning when they are internally motivated to learn.

Table 1.1 defines the elements of the learner-centered mentoring paradigm.

Over the past three decades, knowledge about adult learning has expanded far beyond these basic principles. Research has opened new areas of understanding, and we have become more attuned to the complexities of facilitating adult learning.[3] Many related theories inform adult learning practice today. We will focus on three of them: emotional intelligence, self-directed learning, and transformational learning.

Emotional Intelligence

Emotional intelligence is the ability to recognize and understand our own emotions (self-awareness) and the emotions of others (social awareness) and then to use this ability to guide our behavior (self-management) and manage our relationships (relationship management).[4] For example, an emotionally intelligent mentor is easy to relate to and always makes her mentees feel comfortable, even when her own workload is demanding. Her door is always open, both literally and figuratively. She listens carefully and asks good questions, so her mentees believe that she "gets them."

TABLE 1.1

Elements in the Learner-Centered Mentoring Paradigm

Mentoring Element	Changing Paradigm	Adult Learning Principle
Mentee role	From: Passive receiver To: Active partner	Adults learn best when they are involved in diagnosing, planning, implementing, and evaluating their own learning.
Mentor role	From: Authority To: Facilitator	The role of the facilitator is to create and maintain a supportive climate that promotes the conditions necessary for learning to take place.
Learning process	From: Mentor directed and responsible for the mentee's learning To: Self-directed with the mentee responsible for own learning	Adult learners have a need to be self-directing.
Length of relationship	From: Calendar focus To: Goal determined	Readiness for learning increases when there is a specific need to know.
Mentoring relationship	From: One life = one mentor; one mentor = one mentee To: Multiple mentors over a lifetime and multiple modalities for mentoring: individual, group, and peer models	Life's reservoir of experience is a primary learning resource: the life experiences of others enrich the learning process.
Setting	From: Face-to-face To: Multiple and varied venues and opportunities	Adult learners have an inherent need for immediacy of application.
Focus	From: Product oriented: knowledge transfer and acquisition To: Process oriented: Critical reflection and application	Adults respond best to learning when they are internally motivated to learn.

And she checks in regularly to make sure that they are getting what they need from her when they need it.

To move learning forward, you must become a student and steward of emotional intelligence. This means:

- Being self-aware and managing your own emotions
- Being other aware and able to read your mentees
- Being able to manage your mentoring relationships

Everyone has, to a lesser or greater degree, an innate level of emotional intelligence. As with most other things, emotional intelligence gets better with practice.

The following story of Janine and Roger illustrates a mentor's emotional intelligence at work:

Janine and Roger

Roger, Janine's current mentee, is quiet and shy to the extreme. In their first few conversations, he made no eye contact and literally talked to the wall. She is well aware that he needs time to frame his thoughts and talk about them and has patiently given him leeway to do so. But during their most recent session, he seemed so distant that she doubted if he would even notice if she left the room. She wondered what kind of an impact his one-way conversational style was having on his relationships with work colleagues.

During their next mentoring meeting, Janine stopped Roger when he started "talking to the wall."

"Roger," she began, keeping a neutral tone, "I sense that you have something on your mind that you need to work out. While part of our purpose in working together is to help you deepen your thinking, I'm not sure that the way we're going about it now is the best way to use our time. My observation is that you come here not to get additional perspective, but to actually form your thoughts during our meeting. I can see that when you are working out your ideas, you are staring at the wall—totally in your head. You don't seem to know that I'm here, and it makes me wonder if I really need to be present." She paused a moment, but Roger was quiet, so she continued.

"We're supposed to be in partnership, but you aren't asking for help. You aren't asking for input. Sometimes I do want to offer a comment, but you can't see that in my body language or facial expression because you aren't looking at me. What's your take on that?"

Roger looked down at his hands, his lips pressed together. Janine could see that he did not know how to respond, so she continued with concerned questions, seeking to understand. "First of all, Roger, I'm wondering if perhaps you've been doing this for so long you're not even aware of it. Maybe you're not conscious of the impact it has on other people, especially those you work with. I think that's something that we should be talking about."

Janine could see that Roger lacked the emotional intelligence to understand the impact of his behavior on others. She also was aware that Roger wasn't taking optimum advantage of her time as a mentor to sort out his thinking in advance.

Janine is an experienced and excellent mentor. She always tries to turn situations into learning opportunities, and she creates a climate for openness. She makes her mentees feel confident even when they are clearly wrong, and she does this by giving them feedback in a way that can lead to new understanding rather than embarrassment or anger. She shares her own stories and experiences, and reveals her vulnerabilities as a way of demonstrating her support. She doesn't solve problems for her mentees but empowers them to do it for themselves.

Although Roger was resistant at first, Janine's understanding and nonthreatening approach finally got through to him. He needed structure in order to marshal his thoughts, and she provided it. As a result of her feedback, Roger began to come to the sessions more prepared with his thinking, so that he could present ideas to Janine and be ready to listen as well as talk. Janine challenged him to bring that same intention to his other meetings and to become more aware of his tendency to engage in one-way communication. By raising his awareness and challenging him to monitor his behavior, Roger was able to more fully engage in the relationship. Over time, he became an active mentoring partner and more engaged with colleagues.

Lack of self-awareness is the biggest impediment to developing emotional intelligence. Parker Palmer reminds us that "encounters with mentors . . . can awaken a sense of self and yield clues to who we are."[5] Janine "gave Roger a clue" and, as a result, stimulated the growth of his emotional intelligence.

Effective mentors are emotionally intelligent and foster emotional intelligence in their mentees. Table 1.2 offers some questions for you to consider in thinking about your own emotional intelligence.

Self-Directed Learning

Malcolm Knowles popularized the term *self-directed learning* (SDL) to describe how adults take initiative and use resources to further their own learning efforts.[6] Today SDL has become a hot topic and buzzword. But what does SDL really mean?

On the surface it seems self-explanatory: adults should, by nature of their adulthood, be self-directed. Knowles was explicit as to what was involved: diagnosing learning needs, formulating learning goals, identifying learning

TABLE 1.2

Questions to Consider About Emotional Intelligence

Four Components of Emotional Intelligence	Questions to Consider
Self-awareness	Do you recognize and understand your moods, your emotions, and what drives you? Do you understand the impact of your moods and emotions on other people?
Self-management	Do you control or redirect your impulses, behaviors, and moods? Are you able to suspend judgment? How flexible are you when circumstances change or you have to overcome obstacles? Do you consistently strive for your personal best?
Social awareness	Are you aware of other people's emotions, needs, and perspectives and take them into consideration? Do you pursue your goals with persistence and energy? Do you maintain optimism even in the face of failure? Do you have a passion and strong drive to achieve something for others?
Relationship management	Do you respond to the emotional reactions of others appropriately? Do you exhibit cultural sensitivity when dealing with other people?

Source: Adapted from Goleman, Boyatzis, and McKee (2002).

resources, selecting and implementing learning strategies, and evaluating learning outcomes in his framework. And yet adulthood does not necessarily grant the knowledge or capacity to do this work.

Is SDL more of a destination than a journey? To what extent does cultural context bear on the amount of initiative a learner will take? Researchers continue to wrestle with these questions and define SDL as a phenomenon.[7]

Although the term *self-directed learning* suggests learning through one's own efforts, SDL assumes that it takes place in connection with others as resources, not in isolation. The principles and practices of SDL honor

the uniqueness and adulthood of the mentee by shifting control from the facilitator to the learner. Ultimately mentees must accept responsibility for their own learning.

The capacity for SDL exists in varying degrees in each person. The mentor's role is to facilitate the process, keeping the mentee's development front and center. As Cheryl Lowry has said, facilitating self-directed learning means inspiring "learners to view knowledge and truth as contextual, to see value frameworks as cultural constructs, to appreciate that they can act on their world individually or collectively to transform it."[8]

Mentoring is the quintessential expression of SDL. In a mentoring relationship, both parties mutually define and share responsibility. Together they develop strategies, find resources, and evaluate learning together. At its core, the mentoring agreement (discussed in Chapter Five) is a learning contract that defines the objectives, strategies, resources, time line, and evaluation methodology of the relationship. To that end, as a mentor it is important to:

1. Create a learning partnership.
2. Help mentees identify goals for learning.
3. Negotiate a learning contract.
4. Help learners discover what objectives they should set.
5. Use multiple modalities and resources to achieve the objectives.
6. Manage the learning experience.
7. Help mentees stay focused on the goals, objectives, and learning strategies.
8. Periodically revisit goals to stay on track.

Transformational Learning

We often hear someone describe mentoring as a transformational learning experience and assume that something has changed as a result. But transformation is really about becoming open to possibilities and perspectives by critically reflecting on one's lived experience.[9] This generates new insights and signals a change in how we see and make sense of the world, and it brings about more aligned, sustainable, and synergistic behavioral patterns and action.

Mentoring can be transformational for both mentors and mentees. For example, although she had informally supported various colleagues for years, Lauren had never been a mentor. But because she had had several great mentors, she welcomed the opportunity to "pay back" by

mentoring Jonas, who was quite ambitious and talented but was having trouble getting ahead. The experience, however, did not go quite as she had planned:

Lauren and Jonas

Lauren enthusiastically shared her experiences with Jonas. She told him stories about how she got started, her career journey, the people who supported her, and how she learned to network her way to the top. After several months, she began to notice that Jonas seemed interested in her stories but was not really engaged.

"What's wrong?" she asked. Jonas shrugged, but said nothing. With a start, Lauren realized that although he now knew everything about her path, she still didn't know much about Jonas.

"Jonas," she said, "here I've been going on and on about my experiences—let's talk about you for a change!" Jonas perked up. But as he told her his stories, she realized that Jonas really didn't know very much about himself. He was so busy climbing to the top that he hadn't taken time to reflect on what he was doing.

Lauren began to listen more attentively and ask questions to get Jonas to reflect on his experiences. As he became more comfortable talking, she invited him to explore his underlying behavioral assumptions and examine why he did what he did in specific situations.

This was new territory for Jonas, but he got the hang of it fairly quickly. Soon Jonas's insights led to extended conversations about values and beliefs, and the realization that his values did not align with his leadership behaviors and future aspirations. Jonas began to see that leadership was not about moving ahead from one stepping-stone to the next. He needed to make some deeper changes to be successful. He would have to let go of behaviors that were holding him back and consider alternatives.

Working with Jonas also had a profound effect on Lauren: she began to reflect on her own leadership journey and saw some areas in which she too might become more self-aware. When she looked at her own assumptions about her leadership team, she decided to make significant changes in how she was leading her team. The positive feedback was immediate. Several direct reports commented that she seemed to be listening more. The questions she raised reengaged her team, created more ownership, and enabled them to reach new goals.

> Lauren was amazed at how dramatically subtle shifts in her behavior affected the productivity of the team and led to changed behavior in other parts of her life as well. She was more conscious of her behaviors and assumptions and how they drove her responses and behavior. She continued to be more self-aware and was able to catch herself more quickly when she occasionally slipped back into old habits.

Mentors can help mentees become more aware of how their beliefs, assumptions, and behaviors affect their daily lives by letting go of self-limiting and unrealistic assumptions that hold them back. Because the relationship is collaborative and both partners are learning, mentors can have similar transformational insights about their own behavior and make changes they never before considered.

The Four Levels of Learning

Inevitably both mentors and mentees bring different levels of experience and competence to the relationship. The competence model contributes to understanding the learning cycle by breaking it into four stages: (1) unconsciously incompetent, (2) consciously incompetent, (3) consciously competent, and (4) unconsciously competent.[10] If you remember the process of learning to ride a bicycle, you already understand the nature of these four levels.

Table 1.3 summarizes the four stages. You can use the chart to gain some insight into your own competency level and gauge your mentee's competency level in relation to the four levels.

- *Level 1: Unconscious incompetence*. Learning begins when we become conscious of what we do not know. In the first level, we "don't know what we don't know." As a result, we may appear overconfident. You may have a mentee who is new to his professional role and thinks he knows what he needs to learn—but in reality, he doesn't have a clue because he is essentially blind to what he doesn't know. Similarly, if you have never mentored anyone, reading this book may shine a light on knowledge gaps you didn't know you had.
- *Level 2: Conscious incompetence*. At this second level, we become aware of our lack of knowledge or understanding. As these gaps surface, we become less confident. For example, you may realize that you need to learn more in order to become an effective mentor. You may opt for training, surf the Internet in search of pointers, or talk to other mentors.

TABLE 1.3

Levels of Competence and the Mentor's Role in Learning

Level	Learners	Mentor's Role
Level 1: Unconsciously incompetent	Learners are unaware of what they do not know, or they may assume they know something when they really don't. Confidence exceeds ability.	Support discovery of how much the mentee needs to learn (blind-spot awareness).
Level 2: Consciously incompetent	Learners become aware of what they do not know (the gaps) and can articulate, "I don't know how to do that." Confidence drops.	Encourage by helping the mentee understand mistakes. Ask questions to deepen his or her thinking. Facilitate application of new knowledge.
Level 3: Consciously competent	Learners want to take learning deeper. They know the information, process, and skill but still need to carefully think through the process. Confidence rises.	Provide opportunities to practice. Offer feedback.
Level 4: Unconsciously competent	Learners know the information, process, and skills and demonstrate competency at using them, but they no longer have to think through the steps. Confidence is demonstrated.	Engage in reflection on practice to facilitate continuous improvement. Watch for signs of complacency.

- *Level 3: Conscious competence*. By the third stage, we are aware of what we don't know and develop competency through concentration and practice. The more we practice, the more confident we feel. Let's say you have read this book and are starting to implement what you've read. You will find that you are very attentive to what you are doing as you integrate theory and practice.
- *Level 4: Unconscious competence*. In the fourth stage, unconscious competence, using the skill or knowledge has become habitual and second nature. We move confidently, without having to think through the steps.

When you've read this book and practiced its concepts long enough, that knowledge will become part of your approach. But rather than getting lulled into complacency and saying, "Aha! Now I've got it!" stay humble: always be reflective about your practice, and realize that there is more to learn.

LEARNING STYLES AND COGNITIVE FRAMEWORKS

Everyone has his or her own learning style. When both you and your mentee are familiar with your mentee's learning style, you can use that knowledge to help facilitate learning.[11] For example, if your mentee is a logical person who is data driven and fact oriented and you operate more intuitively, you will need to remember that your mentee approaches learning in a more structured, specific way than you are normally comfortable with. Adjusting the learning in a way that meets your mentee's needs rather than your own is a good rule of thumb in creating an environment that facilitates learning.

Our cognitive framework—how we make meaning—also influences how we learn and act. William Perry describes a developmental continuum of progressively more complex meaning structures (ways of thinking) that affect how we act (ways of being).[12] Perry offers four frameworks: dualism, multiplicity, relativism, and commitment. Essentially these are lenses through which individuals may view the world. Knowing which lenses your mentee is wearing is fundamental to your success in facilitating an effective learning relationship:

- *Dualism*. This individual sees dichotomy and concreteness everywhere: right or wrong, we or they, should or should not. As a mentee, this individual sees the mentor as an authority figure dispensing knowledge and truth. This mentee will expect you to direct the mentoring process, so you will need to emphasize the collaborative nature of the mentor-mentee relationship.
- *Multiplicity*. This individual sees each person as having his or her own truth because "everyone is entitled to their opinion." Relying on feelings rather than logic, the mentee sees all knowledge as equal. As a mentor, you will need to help this mentee assess the value of different options and see how knowledge fits together.
- *Relativism*. This individual sees diversity of opinion everywhere and analyzes these opinions relative to each other. Reality takes on a qualitative dimension, depending on its context. Your mentee sees you as mentor as one of many resources with whom he or she is interacting. As a mentor, you can facilitate learning by helping your mentee contextually analyze his or her thinking.
- *Commitment*. Perry's fourth framework is qualitatively different because it describes ways of being rather than ways of thinking. A committed mentee is internally motivated to act out of an awareness of relativism.

As mentor, you can facilitate learning by helping your mentee connect thinking with acting.

APPLYING ADULT LEARNING CONCEPTS TO MENTORING

Over a century ago, Louis Agassiz was a natural history professor at Harvard University.[13] One day, he assigned his student the task of observing a fish and then left him alone. The student quickly grew bored with the assignment and concluded that he had "seen all there is to see." To fill his time while waiting for Professor Agassiz to return, he took a pencil and paper and drew the fish. And as he drew, he discovered features he had not previously observed.

When the professor returned, the student eagerly reported what he had found from observing and drawing the fish. At first, Agassiz praised his student and remarked, "A pencil is one of the best of eyes." Then he challenged him, saying, "You have not looked very carefully! Why, you haven't even seen one of the most conspicuous features of the animal, which is as plainly before your eyes as the fish itself. Look again, look again."

This scene between Agassiz and his student repeated itself over and over. And with each new observation by the student, Agassiz offered a compliment, followed by a challenge to "look, look again." In this way, Agassiz offers valuable lessons in adult learning and mentoring. For example, rather than telling the student the answer, Agassiz provided an opportunity for self-discovery and reflection. In addition, he paced the learning to be sensitive to the student's need. And he kept encouraging the student to examine the fish from many different perspectives: to look more deeply. That is exactly what I hope you will do.

Polly Berends writes, "Everything that happens to you is your teacher. The secret is to learn to sit at the feet of your own life and be taught by it."[14] Research supports this: one of the best ways adults learn and also retain the knowledge they learn is through critical reflection on experience. According to Stephen Brookfield, who has made a study of the process of critical reflection and adult learning, critical reflection is an attempt to uncover and explore the assumptions that underlie what we do and how we do it so that our actions become more informed, integrative, and aligned.

The exercises throughout this book offer you the opportunity—and challenge—to "look, look again" and learn from experience. When you can use that learning to full advantage in your mentoring relationships, you will be in a better position to enhance the learning of your mentees. You will also be better prepared to encourage your mentees to learn from their experiences.

THE MENTOR'S JOURNEY

Let's begin by making sure you have a clear understanding of your own personal journey. Each of us is an amalgamation of our own life experiences. By becoming a student of your own journey, you will be better able to understand its flow and pattern. Observing the journey is also a telling way to test out assumptions—a healthy sense of perspective is useful in guiding your mentee's learning.

This is a vitally important step. When we fail to differentiate between self and other in a mentoring relationship, we run the risk of projecting our own lived experience onto our mentee. The result is that the mentee's learning becomes formulaic rather than individualized, and the mentee ends up front and center on your stage rather than creating his or her own.

Reflecting on Your Personal Journey

The metaphor of the mentor's journey captures the meandering quality of the movement that follows us as we face new challenges and go off in new directions. We experience unexpected delights, lurking dangers, doors opening and closing, change, and ennui. It's easy to be distracted in the moment, and this exercise gives us the time we need to properly observe and reflect. "In the mentoring process," say Huang and Lynch, "reflection enables us to slow down, rest, and observe our journey and the process of self-knowledge that is so important along the way."[15]

There are three steps in the observation process:

1. *Gain self-awareness*: This step is triggered by self-reflection. It is fundamental to understanding your role in facilitating effective learning relationships.
2. *Understand the mentee's journey*: Mentees bring their own history of experience to the mentoring relationship. When you engage the mentee in a discussion of that experience, you can avoid the "mentor cloning" trap—inadvertently training your mentee to become another version of yourself.
3. *Gain perspective*: Look again at your own journey and that of your mentees. What you learn from observing these separate and distinct paths has direct implications for the learning outcomes.

There are many ways to depict a journey. The way you choose will be uniquely your own. You may choose to construct a time line (as in Exercise 1.1) by making notes, or you may prefer a more graphic approach. The means for completion are not as important as taking the time to reflect on your

EXERCISE 1.1

Your Personal Journey Time Line

The line in the box below represents your journey as an adult from the past to today. Using words, symbols, or drawings, sketch your journey on the time line.

1. Draw a time line horizontally on a sheet of paper, like this, allowing as much room as you need above and below the line:

2. In the space above the time line, note significant life events that have influenced you the most. Do not feel constrained to stick to work-related events or even those that have to do with mentoring. Focus on the events, milestones, and transitions (positive and negative) that have had an impact on your development.

3. Now turn your attention next to the space below the time line:
   - Identify opportunities that made a difference in your life and helped you grow and develop.
   - Identify obstacles that got in the way of your journey.
   - Note "unexpected delights"—events and experiences that were not planned but just happened.
4. Review your time line of events, and add the names of individuals who contributed to your development.

5. What lessons did you learn, and how did they change your thinking?

6. What new understandings emerge for you as you review your time line of experience?

personal journey and consider the movement that has brought you to the place you are in your life. Here's one example.

Miriam's Time Line

Miriam volunteered to be a mentor to women who wanted to make a transition in their careers. In preparing for her role, she constructed a time line of her own career journey, which had taken a unique course.

A utility company had hired Miriam immediately after she completed her associate degree at the local community college. After ten years in a variety of jobs, she was promoted to a managerial position. A number of years later, her daughter was fatally injured in a hit-and-run accident. Not long after, she decided to pursue a nursing degree, which she completed three years later. She left the company to take a job as a floor nurse at a local hospital, where she now holds a supervisory position.

In constructing her time line from line worker to nursing director, Miriam identified seven significant life events as having shaped her development: two marriages, a divorce, the death of her daughter, going back to school, specific job promotions, and a fortieth birthday celebration.

She also identified three specific opportunities that helped her grow and develop: a mentoring relationship with a woman who was "a fabulous role model for the possible," the educational opportunity provided by the company, and a spouse who was her "cheerleader, guide, and support." But many experiences also blocked her development along the way: living with a spouse who could not understand her dreams and ambitions, tedious work, and coworkers who tried to undermine her educational advancement.

She would be the first to say that serendipitous events and experiences contributed to her growth and development. One of these was meeting Charlotte, her mentor, at a neighborhood holiday party. Another was spending hours visiting her critically ill daughter in the hospital.

In reviewing her time line, Miriam realized that there were more hidden helpers—individuals who contributed to her growth and development—than she had realized. Among these were her mother, her eldest son, a ninth-grade teacher, her first supervisor,

> the head nurse at the hospital where her daughter lay dying, a favorite aunt, and a motivational speaker at a conference she had attended.
>
> She realized how much her thinking had changed over time. Instead of letting change happen to her and push her around, she learned how to deal with it and ultimately became a change agent for others. She became a can-do person, taking responsibility for her own life through accepting risks and daring to dream.

Completing the time line exercise helped Miriam become aware of how many people had helped her on her journey. "I never realized how privileged I've been; I knew on some level, but not to this extent. I was overwhelmed with gratitude, and felt a need to reconnect with some of these people. I also was more clear about why I wanted to be a mentor: I needed to give back some of the gifts from others that I'd been privileged to receive."

Reflecting on Your Mentoring Journey

In *Composing a Life* (1989), Mary Catherine Bateson describes her developmental journey through life as a composition of connections with women friends who flow in and out of her life at different stages, times, and places. Each has contributed to making her who she is. She reminds us that "the past empowers the present, and the groping footsteps leading to the present mark the pathways to the future."[16]

In Exercise 1.2 you will construct a mentoring time line. In it you will reflect on what you have learned from the mentors (or other people) who have been part of your life's composition and explore how that learning might affect you as a mentor. You can use a piece of blank paper, or write your thoughts in your journal.

The Mentee's Journey

It is human nature to make assumptions about others and project our own experiences and reality onto them. Sometimes, with relatively little real information, we blithely fill in the blanks and become convinced—mistakenly, as it usually turns out—that we understand the other person. Mentors especially need to guard against this temptation and be aware of what sets their journey apart from their mentees'. One way to do this is to understand not only your own journey but the mentee's journey. Here's a cautionary tale:

EXERCISE 1.2

Reflecting on Your Experiences as a Mentee

Think about your mentoring experiences and the people who were there to guide, support, and strengthen you:

My mentors were:

When did they come into my life?

What wisdom have I gained from each of them?

What were the most satisfying aspects of those relationships, and why?

What were the least satisfying aspects of those relationships, and why?

What did I learn about being a mentor from these experiences?

What did I learn about being a mentee?

Madeline and Gordon

Madeleine moved to the Southwest after working as a real estate broker on the East Coast for more than thirty years. In a matter of months, she became active in her condominium association and was elected one of its officers. After eight years chairing the association board, she was eager to move on. However, there were no apparent successors with previous experience or knowledge of property management issues. In order to develop a new generation of leadership quickly, she and her board agreed to set up strategically paired mentoring relationships with future association leaders.

When Gordon heard about the vacancy on the board, he immediately volunteered to serve. He said that he "was looking for something to keep him busy" and thought that this opportunity might be "just what he was looking for." Madeleine was not convinced that he could provide the necessary leadership, but she was outvoted by her fellow officers. She thought that Gordon was "a nice enough person" but just looking to fill up his time. She was concerned about gaps in his knowledge of issues and problems and offered to mentor Gordon.

Madeleine spent a week putting together an agenda and materials to orient Gordon to what she felt he needed to know. But when she presented her list to him, he was affronted—and rightly so.

It turned out that Madeleine's assumptions about what Gordon knew were erroneous. Gordon was the former owner of two construction companies and held an M.B.A. His son managed his properties. Gordon's learning needs were not the same as Madeleine's because his experience was different from hers. Had she known more about her mentee's journey before she prepared an agenda and materials, their relationship could have started on a more positive note.

Exercise 1.3 asks you to think about your current or prospective mentee's journey. It is intended to help you gain a better sense about the person you are mentoring, but you will not be constructing a complete time line with details as you did in the previous exercise. If you already know something about this person, the exercise offers an approach for testing out your own assumptions and gaining a clear understanding of factors that may affect the learning relationship.

EXERCISE 1.3

Your Mentee's Time Line

The line in the box below represents your mentee's journey as an adult from the past to today. Using words, symbols, or drawings, sketch this journey on the time line.

1. Draw a time line horizontally on a sheet of paper, like this, allowing as much room as you need above and below the line:

2. What do you imagine your mentee's journey has been? Start with the present and work backward. Think broadly, filling in known milestones, experiences, and events.

3. What more do you need to know about your mentee in order to have a better sense of his or her journey?

4. If you need to gather more information, what questions will you ask your mentee? What information can you gather from other sources?

5. What insights does your mentee's journey raise for you about his or her readiness to learn?

Use a pencil (rather than a pen) to complete Exercise 1.3 because the data you have now, particularly if this is a prospective mentee, will probably be incomplete. If you lack information to fill in the time line, this may be a clue that you need more baseline data from your mentee. Ask questions, and gain the information you need to complete the mentee journey time line. One way to avoid the tendency to use a one-size-fits-all approach when mentoring several individuals simultaneously is to think about the answers to the questions in Exercise 1.3 and become aware of your knowledge gaps about a particular mentee's developmental journey. Completing this exercise will help you identify potential needs and conversation starting points.

Awareness of Self and Other

The mentoring relationship is innately complex because it involves two unique individuals. It is important to preserve the differentiation between self and other and not attempt to homogenize journeys. As Bateson notes, "Work relationships of any kind are enlivened by difference combined with mutual commitment."[17]

In Exercises 1.1, 1.2, and 1.3, you've considered your journey and your mentee's journey separately. In Exercise 1.4, you will consider your mutual journey: Where are you on your journey time line relative to where your mentee is or will be? What implications does this gap present in how you will facilitate learning? The brief story that follows illustrates how you might use what you learn in the exercise.

Niles and Juliana

Niles began his career as a schoolteacher and subsequently switched to city government, where he worked for ten years. As a community service volunteer, he was a mentor in a school-to-work program. He attempted to fill out the mentee time line in Exercise 1.3 with the information he had been given before his first meeting with Juliana, a prospective mentee. After his first several conversations with her, he was able to fill in several missing pieces and gain a better understanding of her needs. But when he completed the self and other exercise in Exercise 1.4, merging their two separate journeys, he discovered a fresh perspective that would completely change the mentoring relationship.

Niles had recently decided to return to school to get a law degree, and he needed the next few months to prepare for the LSATs. He realized that as much as he wanted to be of assistance, the time he had available might not be adequate in view of the

EXERCISE 1.4

Journey Worksheet: Implications for Facilitating Learning

Look at your own time line in Exercise 1.1 and your mentee's time line in Exercise 1.3. Consider where you are right now on your time line and where your mentee is on his or her time line. Then answer the following questions:

1. What concerns and issues does this comparison raise for you as a mentor? Are there significant differences in your life experiences? Where are the biggest gaps in your experiences?

2. What concerns and issues does the comparison raise for you about your (prospective) mentee's learning needs and learning goals?

3. What specific actions or approaches could potentially have a positive impact on the learning relationship?

4. What specific actions or approaches could potentially adversely affect the learning relationship?

5. What strategies might you use to overcome them?

immediacy of Juliana's need. He struggled to find a way to do both and decided to be candid with both his mentoring coordinator and Juliana. They were both grateful that he was open about his personal needs, and they were able to identify workable strategies that would satisfy both his time constraints and hers.

Experience and Reflection

Our own lived experience is the text for self-discovery and learning.[18] It is the most powerful learning resource we have at our disposal. When we are able to reflect critically on our own varied life experiences and learn from them, we can model this critical reflection in our mentoring interaction. For example, Barry learned that his golf game improved when he was able to slow down, concentrate, and maintain his focus. He realized that if he made these same changes at work, he would be more efficient, productive, and focused there as well.

Exercise 1.5 demonstrates how to bring your personal experience to your mentoring work. Jot down quick responses in bullet form. Then revisit them more extensively later, or use the data you generate in conversations with your mentee. If the space provided here is insufficient, you might choose to begin a journal with these questions as the topics, noting the first words and phrases that come to mind as you read the questions. You may also choose to engage in conversation as a way of addressing the questions. Answer the reflection questions only after you have completed the first four items to your satisfaction. Assess the level of difficulty you experienced in addressing these questions.

Use this exercise as a reference point as you raise these same kinds of questions with your mentee. For example, if you experience difficulty in answering these questions, you can say authentically to a mentee, "Look, I know these questions are difficult to respond to. I ask myself the same kinds of questions, and frankly, it takes me a while to come up with answers that satisfy me. Still, I've found that really thinking about what I've learned from my personal experiences helps me improve my performance."

Here's how Angela incorporates reflection on experience into her work:

Angela's Story

Angela is a mentor in a distance learning program. She has several student mentees and has found an effective way to help them reflect on their experiences. Whenever she works with her mentees on a practicum project, she advises them to write in their journals about their learning as it occurs. She encourages them to review

EXERCISE 1.5

Reflecting on Your Experience

This exercise offers the opportunity for a fresh perspective on how it feels to reflect on experience consciously and to learn from it. It will put you in touch with some experiences you have had that can assist you in facilitating your mentee's learning.

Your Experience

1. Working quickly, jot down bulleted responses or words that come to mind for these questions:
   - What lessons have you learned from your successes?
   - What lessons have you learned from your mistakes?
   - What dilemmas do you face daily?
   - What lessons have you learned from grappling with those dilemmas?
2. Let your answers sit for a while. Later, review your answers to see if they trigger additional responses. Then complete these questions:
   - What was it like to address these questions?
   - How would you rate the level of difficulty?

   Easy _____ Difficult
3. What did you learn about yourself in going through this exercise?

Alternatively (or in addition), you may want to ask mentees to complete this exercise and discuss what the experience of reflecting on experience was like with them. In this way, you can position the learning, saying, "Part of learning is reflecting on experience; this will give you a preview of what that is like."

their entries before starting the next project. At the end of each project, she encourages them to make another entry. And again, before beginning the next practicum project, she asks them to review all prior entries.

Getting to know a mentee does not mean knowing everything about that person. Rather, gaining a good sense about who this person is and what he or she brings to the learning relationship helps the mentor connect and facilitate a more meaningful learning experience. Listening well and asking thoughtful questions are often just enough to elicit the relevant information. Making notes at the end of each mentoring session about events, special people, or concerns your mentee has talked about is helpful. At the same time, identify specific points of connection for the next mentoring session. When you deeply understand the power of experience and reflection, you are better prepared to facilitate learning relationships.

Facilitating Adult Learning

As a mentor, you need to be skilled at facilitating adult learning—engaging mentees as active participants in their own learning by encouraging self-reflection and self-authorship. In essence, you are creating conditions that enable mentees to learn.

Facilitation is rooted in Malcolm Knowles's principles of adult learning. According to Knowles, these practices promote effective facilitation:[19]

- Establish a climate conducive to learning.
- Involve learners in planning how and what they will learn.
- Encourage learners to formulate their own learning objectives.
- Encourage learners to identify and use a variety of resources to accomplish their objectives.
- Help learners implement and evaluate their learning.

"Facilitators of learning," as Brookfield puts it, "see themselves as resources for learning, rather than as didactic instructors who have all the answers."[20] You can facilitate learning in many ways, all the while listening, empowering, coaching, challenging, teaching, collaborating, aiding, assisting, supporting, expediting, easing, simplifying, advancing, and encouraging. The flow of your facilitation will always depend on the needs of the mentee. Some learners may need more support and direction to feel comfortable with the process, while others feel prepared and are ready to go to work immediately.

EXERCISE 1.6

Reflecting on Facilitation

Think about your experience in facilitating someone else's learning. Or recall an experience of someone you observed facilitating another person's learning. Now answer the following questions:

1. Describe an experience in which the goal was to facilitate someone else's learning.

2. What did you do? What did the learner do?

3. What factors affected the success or derailment of your efforts?

4. What metaphor best describes how that experience felt for you?

5. What, if anything, would you do differently in facilitating your mentee's learning?

TABLE 1.4

The Facilitator's Reference Guide

1. Engage mentees and tap into their unique experiences.
2. Encourage mentees to reflect on their past experiences and use them as learning opportunities.
3. Inspire and build mentee confidence and competence.
4. Create a positive, safe learning environment.
5. Relate to mentees' situations, issues, and concerns.
6. Consider the timing.
7. Pace the learning.
8. Allow adequate time for mentees to integrate and reflect on the learning.
9. Use a variety of approaches that draw on different learning styles.
10. Be flexible and open to new ideas.
11. Respect mentees' unique needs and cultural differences.
12. Be clear about the purpose, direction, and boundaries of the learning.
13. Ask for feedback on your facilitation techniques.
14. Be open to suggestions for improving the process.

Exercise 1.6 will help you appreciate some of the complexities of learning facilitation and ways in which you will approach it with your mentees.

Mentoring is a process of becoming for both partners. Although we want to encourage mentees "to look, look again," we also need to be our own diligent observers of the process. I encourage you to refer to the facilitator's reference guide in Table 1.4 to help you stay on track.

WHAT MENTORS DO

Mentors facilitate learning by keeping the learner front and center. To mentor effectively, you will use the learning approach most appropriate for your mentee. Asking questions, reformulating statements, summarizing, listening for the silence, and listening reflectively will help you do this. These strategies should always be part of your toolkit.

Ask Questions

Questions encourage learning by allowing us to reflect. Asking questions that require thoughtful answers (like those in the exercises in this chapter) is a good way to help mentees articulate their own thinking. Use questions to engage the mentee in the conversation. Remember: ethical, role-appropriate

questioning is a must. When you stray outside these boundaries, it is easy to exceed limits of appropriateness and fairness.

- Ask questions that support and challenge—for example: "That's a nice way of describing the culture. How would you apply some of that thinking to the staff?"
- Ask questions to stimulate reflection—for example: "Could you tell me a little more about what you mean by . . . ?" "Is there another way to look at this?"
- Ask specific questions that draw on your mentee's unique thinking and learning style—for example: "That seems logical, but let's take a moment to brainstorm some other possibilities." "It sounds like you have a lot of good options! Is there one that you really resonate with?" "That's a great idea. How do you think we might put it into action?"
- Allow time for thoughtful reflection—for example: "It sounds as if we've only begun to scratch the surface. Let's think about this some more and discuss it further in our next conversation."

Reformulate Statements

When we rephrase what we've heard mentees say, we can clarify our own understanding and encourage the mentee to hear and reflect on what they have articulated. This offers an opportunity for further clarification:

- Paraphrase what you heard—for example: "I think what I heard you saying is . . ."
- Continue the process of rephrasing and paraphrasing until you clearly understand and the mentee is no longer adding new information—for example: "My understanding is . . ."

Summarize

Summarizing what you've learned during a session reinforces the learning. It also serves as a reminder of what has transpired and acts as a way to check assumptions:

- Share the content of what you have heard, learned, or accomplished—for example: "We've spent our time today doing . . . During that time we . . . As a result, we achieved the following outcomes . . ."
- Leave judgments and opinions out when you summarize—for example: "Did you say that . . .?" "I understood you to say . . . Is that correct?"

- Deal with the facts of the situation, not the emotions—for example: "So, I am hearing three things. Number 1 is . . ., number 2 is . . ., and number 3 is . . ., Have I got that right?"

Listen for the Silence

Silence provides an opportunity for learning. Some individuals need time to think quietly. Silence can also indicate confusion, boredom, or even physical discomfort:

- Don't be afraid of silence.
- Encourage silence.
- Use the silence as an opportunity for reflection—for example: "I notice that whenever we started to talk about . . . you get kind of quiet. I'm wondering what that is about."

Listen Reflectively

Often we hear but do not really listen. When you listen reflectively, you hear the silence, observe nonverbal responses, and hold up a mirror for the mentee:

- Be authentic—for example: "What I'd like to see is . . ."
- Clarify—for example: "What do you mean by . . . ?"
- Provide feedback—for example: "You did a great job with that. I like the way you . . . I also thought that . . . Next time you might try . . ."

When your work is solidly grounded in principles of adult learning, you and your mentee can be colearners who both benefit and grow from the relationship. The two chapters in Part One will broaden your understanding of the learning process by exploring the role of context and its influence in the mentoring process.