



# District 42

## *"The Mentoring Guide" Series*

### *How to Build a Successful Club Mentoring Program*

# Module 3

## Training the Mentors & Mentees



**Developing Leaders through Shared Experience**

# INTRODUCTION

“*The Mentoring Guide*” series is a step-by-step guide in four modules for clubs that wish to implement a mentoring program or strengthen an existing one.

“*The Mentoring Guide*” series takes the reader on the journey through the entire promotion, implementation, training and mentoring partnership process and provides useful templates and forms to assist the club in developing a mentoring program that fits your members’ unique goals and needs. It is designed to quick-start your ability to develop leaders through shared experience.

There are four modules in *The Mentoring Guide Series*:

- 1) Promoting the vision of a club mentoring program
- 2) Implementing the club mentoring program
- 3) Training the mentors and mentees
- 4) Building the B.E.S.T mentoring relationships

The Vice-President, Education is responsible for implementing and maintaining the mentoring program, although he/she may appoint a member of the Education Committee to be the mentoring program coordinator.

*The Mentoring Guide* provides practical tips and tools to help the club implement and manage the mentoring program and is intended to complement *The Successful Club Series: Mentoring* module and the *Club Mentor Program kit*, both available from Toastmasters International. These two resources offer valuable information, which we have not duplicated in this guide and can be used in conjunction with *The Mentoring Guide*.

*The Successful Club Series: Mentoring* module defines mentoring, discusses benefits, describes roles and responsibilities, and advocates mentoring programs in clubs (Catalogue No. 296).

*The Club Mentor Program kit* includes: a brief outline -- How to Administer Your Club’s Mentor Program, 20 Mentor Assignment Notices, 20 Mentee Assignment Notices, 20 Member Interest Surveys and a sample Mentor Certificate, all of which are useful tools in starting a mentoring program. (Catalogue No. 1165)

# PURPOSE

Part of The Mentoring Guide Series, this module describes how to train mentors and mentees and tailor the training so that it is consistent with your mentoring program. The module includes information about the expectations of mentors and mentees so that each knows what mentoring is; what resources are available; and what his / her responsibilities are. A structured training program will ensure consistency in the mentoring process.

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The Mentoring Guide  
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©November 2003 District 42 Mentoring Team: Mona Cooley, Darlene Davies, Nandini Venkatesan, Marvin Henry, Peggy Gibennus, Bob Gibennus

# TRAINING STRATEGY OPTIONS

Early in the implementation, arrange for a mini-workshop to train the mentors and mentees. This works best when the workshop is interactive so that there is an exchange of information rather than one person speaking. Invite one of your experienced members to lead the workshop or invite a mentoring resource from the District to lead it for you.

The workshop can be any length from 20 minutes within a meeting agenda to a ½ day on a weekend. The critical factor is how much time the members want to commit to the training. Some options to consider are:

- 20-30 minute workshop within the club meeting to enable every member to gain an overall understanding of the mentoring program and the roles and responsibilities of a mentor and mentee.
- 60 minute workshop on Building the **B.E.S.T.** Mentoring Relationships.
- ½ day workshop to provide in depth training for mentors and mentees. In this workshop you might work through the types of mentors, how to be a good mentor or mentee (**LEARN** and **BELIEF** sections that follow), developing common expectations, problem-solving, assessing progress, and how to develop the B.E.S.T mentoring relationships.

## DESIGN THE TRAINING

Once you have a strategy in place, you can design the workshop in a format that works for you. The following pages outline the specific key points that need to be covered in the training of each participant in the program.

# TRAINING SESSION CONTENT

You will want to create your own training program, specific to the unique needs of the members of your club, this section of the module is designed to provide you with a list of key elements that should be included in the training session. Also included is a brief description of each item.

## Mentoring Program Protocol

### 1. Who does the New Member Orientation?

Officially this is the responsibility of the VP Membership, but if you choose to have it done within your club's mentoring program, you will need to establish a protocol for it that would include:

- Who does it?
- What is included?

An example process might look like this: Within 2 weeks of joining a new member will be offered an orientation session that will be delivered by a member of the club mentor pool.

Your training session will include the details so that everyone is clear on the process.

### 2. How are mentors assigned?

A brief explanation should be given so that everyone understands how your club assigns mentors. Each club will have its own preferences. Some **options** include:

- Mentors meet certain criteria, such as active membership in the club for a certain period of time, a given number of speeches delivered, etc.
- Assign a mentor as soon as the new member joins
- Do the orientation as early as possible and invite the mentee to select a mentor from the list of available mentors a few weeks later, after the new member has had a chance to get to know the club members. If the mentee prefers, a mentor can be assigned.

## Mentoring Program Protocol

### **3. Keeping the Records**

The Mentoring Program Coordinator will have established a system for keeping track of Mentor requests and assignments as well as Mentee accomplishments. More information about this can be found in Module 2 of this series.

You may invite the Mentoring Program Coordinator to give a brief presentation, explaining the system, as part of your training session.

### **4. Mentor / Mentee Contract**

When a Foundation Mentoring relationship has been established it is important that the Mentor and Mentee agree on terms of the relationship including the start and end date, manner and frequency of communication, etc. This includes completing and signing a contract. You can design your own contract or use the information in Module 2 as a guide.

The training session must stress the importance of this stage of the partnership as well as train the mentors and mentees on how to complete this stage.

**Tip:** This could be a good opportunity for a role-play exercise.

## Expectations & Responsibilities

### FOUNDATION MENTOR

#### Role

The foundation mentor helps the mentee set goals, build confidence and develop skills to achieve his/her dreams.

#### Time Commitment:

A contract for an agreed time period (3 months, 6 months or 1 year).

#### Benefits:

Members more likely to stay with the club and achieve goals faster. Mentors gain confidence and feel like they make a difference.

#### Responsibilities:

Coaches individuals to achieve their objectives in the following areas:

- Communication Skills
- Preparation of manual speeches
- Leadership roles

Focus on communication and/or leadership goals.

The mentor accomplishes this by having **BELIEF** in the mentee's abilities and guiding the mentee through the process of development, as described below:

**B**uild relationships – learn about who the mentee is, what his/her interests are and what the mentee wants to accomplish.

**E**valuate with constructive feedback – honest evaluations that empower the mentee and keep him/her on track.

**L**isten to mentee's needs and wants – really listen to what the mentee says and ask for clarification so that the relationship is directed by the mentee's aspirations.

**I**nteraction – ask insightful questions and help the mentee to identify and overcome the extraordinary challenges.

**E**ncourage the mentee to move forward – identify strengths, validate discoveries and demonstrate how the skills can be improved.

**F**ollow-up – ask “How did you feel about your speech or role?” Discuss his/her successes, fears and challenges.

## Expectations & Responsibilities

### FOUNDATION MENTOR

#### Personal Success Planning:

Definitions:

- **Goal:** a broad statement of what you want to achieve in terms that clearly describe the desired end result
- **Objective:** Objectives are specific, measurable statements of what will be done to achieve goals within a time frame of one year or less.
- **Target:** a time-based or quantitative measure

The mentor may share experiences and guide the new member to develop an action plan that will help new member achieve his/her goals in the Toastmasters program. The first question a mentor needs to ask is, "What do you hope to get out of your Toastmasters experience?" Based on the answer, they can begin to develop a plan for success.

An example of a 6 month success plan might include:

- complete 3 projects from the CC manual
- complete 2 projects from the CL manual

The plan needs to have:

- **S.M.A.R.T.** Objectives
  - **S**pecific (CC or CL projects for example)
  - **M**easurable (3 speech projects)
  - **A**chievable (ask, is this reasonable for me?)
  - **R**esults oriented (what will this do for me?)
  - **T**ime sensitive (I commit to completing this goal by...when?)
- Action items (example: 3 speech projects)
  - Schedule 1<sup>st</sup> speech
  - Write 1<sup>st</sup> draft
  - Review 1<sup>st</sup> draft with mentor
  - Re-write speech
  - Practice speech
  - Deliver speech
- Timelines
  - Assign dates to the action items

- Accountability
  - Connect with the mentee regularly to see how things are coming with the plan
  - Are you meeting your predicted timelines?
  - What help do you need?
  - How can the plan be revised or modified to help you achieve success?
- Follow-up and feedback
  - After an objective has been reached celebrate the success together.
  - Discuss the process and ask what was learned from the experience that will help with the achievement of the mentee's long-term goals.

An example of a [Success Plan](#) is found in the Example Forms Section on page 14.

## **Expectations & Responsibilities**

### **MEETING MENTOR**

#### **Role**

Short term coaching for entry-level tasks or roles.

#### **Time Commitment**

Mentoring can be done within the meeting time period.

#### **Benefits**

Helps the new member and guest become more familiar with the club environment and the meeting roles.

#### **Responsibilities**

At the meeting, the meeting mentor provides support to the new member or guest by:

- Arriving at the meeting early, greet warmly and briefing what happens during the meeting.
- Explain the meeting roles and the club environment.
- Prepare the guests in their role and the option to participate in introductions, table topics, and feedback for the meeting.
- Answer questions about the meeting roles, club, and Toastmasters International. Option: During the break or after the meeting.
- Club may choose to assign meeting mentor to a new member for 2-4 weeks or add the role to the agenda changing the person assigned each week.

## Expectations & Responsibilities

### **SPECIALTY MENTOR**

#### **Role:**

One-time support with a focus on specific communication skills, specialty knowledge or roles such as:

- Sergeant at Arms
- Contest chairman, contestant, officials, judging
- Evaluator
- Toastmaster
- General Evaluator
- Toast/Reply
- Storytelling
- Use of PowerPoint for presentations etc.
- Parliamentary procedure, protocol

#### **Time Commitment:**

Relatively low time required, self-defined.

#### **Benefits:**

Helps the club members learn more advanced skills; allows experienced members to share their expertise.

#### **Responsibilities:**

- Review the role in the club manual and/or Toastmasters International publications related to the topic area.
- Instruct the mentee to first read the information available for a specific role or procedure.
- Answer any questions the mentee has prior to performing the task or role
- Provide special tips on doing the specific role (refer to list of specialties) and share experiences.
- Discuss with the mentee afterwards – tell the mentee what went well, offer a suggestion to improve next time, and answer any questions.
- If the mentee indicates interest in another advanced task or role, indicate who the mentor is for that role.

**TIP:** If a club does not have an expert in a subject area that seems important to the club's progress, one member could become a specialty mentor by researching the area of interest, present a speech telling the members about the subject area and giving pointers discovered in the research. For example, often clubs appoint someone to learn about and become the club expert on parliamentary procedures or giving Toasts.

## Expectations & Responsibilities

### **MENTEE**

#### **Role:**

The mentee also needs to know what is expected of them to realize success. Taking the time to train the mentee is an investment in strengthening the relationship and helps the person manage the changes of growth. The mentee will **LEARN** to develop their communication and leadership skills with the support of the mentor.

**L**isten with openness – be willing to hear the words of wisdom, understand the process, experience new ways and be yourself in the process.

**E**ager to move forward – identify and face your fears, discuss action steps with mentor

**A**ction-oriented – in control of choosing the options of action steps, provided by mentor, to be accepted, modified or rejected.

**R**espond with honesty – when asked what you feel/think about an issue, express your true feelings and thought. It will help the mentor decide how to best help you.

**N**ever give up. Be determined to meet the challenges and reap the rewards of success.

#### **Time Commitment:**

A contract for an agreed time period (3 month, 6 months or 1 year).

#### **Benefits:**

Members are more likely to stay with the club and achieve goals faster, gain confidence and generally get a great deal more value from the Toastmasters experience.

## **Expectations & Responsibilities**

### **MENTEE**

#### **Responsibilities:**

- Request a particular mentor or ask to have a mentor appointed (a mentor can be within the club or in another club)
- Review the Communication and Leadership Manual before meeting with mentor.
- Share your purpose for joining Toastmasters, any relevant personal/career goals, your Toastmaster goals, express your needs and communicate your expectations of your mentor.
- Prepare for each role by reading the information in club manual and asking any questions you may have prior to doing role.
- Arrange a convenient time with your mentor to review your strengths in performing the role and areas for improvement (this could be done after the meeting or an arranged phone call time).
- Document each role you complete and how many times for your records.
- Attend the mentoring training(s) offered by Club, Division or District.
- Be responsible for your growth by participating regularly in club meetings (or area and division as you progress), expressing your needs/wants, contributing ideas, appreciating your mentor.

## Expectations & Responsibilities

### **MENTOR COACH**

1. Coaches and provides support to mentors. One of the first tasks will be to clarify how the roles of the VP Membership, VP Education and Mentor Coach will work together in the club.
2. Provide the training for the meeting mentors, specialty mentors and foundation mentors.
3. Update and have accurate information on club roles – refer to Toastmaster International Literature.
4. With the VP Education and VP Membership, develop a club manual describing roles and update as required.
5. Champion the mentoring program
  - Where it is new to the club, introduce how the mentoring program will be implemented in club and how it will be molded to fit the club environment
  - Where the mentoring program has been implemented in the club, provide club members with an evaluation of progress in the club mentoring program and make necessary adjustments twice a year.
  - Assist in planning and celebrating the end of the mentor/mentee partnerships and the transformation to a new stage in their Toastmaster journey.
6. Meet with the mentor and mentee as they begin their partnership to answer any questions they may have about their roles and to encourage them to develop clear goals and expectations for the partnership.
7. Provide coaching and problem-solving support for mentor/mentee partnerships.

**TIP:** Have a mentor yourself to provide support, advice and encouragement.

## **Expectations & Responsibilities**

### **MENTORING PROGRAM COORDINATOR**

1. Reports to the Vice President Education.
2. Responsible for the assignment of mentors.
3. Keeps records.
4. Works with the Mentor Coach to design and deliver the Training.

### **NOTE:**

The roles of Mentor Coach and Mentoring Program Coordinator may need to be combined if you don't have enough people in the club available to do the roles. In some cases one person may have to do all 3 roles: VP Education, Mentor Coach and Mentoring Program Coordinator, but this is not recommended. The more hands the lighter the load.

# EXAMPLE FORMS

## ACTION PLAN FOR SUCCESS EXAMPLE

**GOAL:** to develop the communication and leadership skills necessary for success in doing presentations at work. Within the partnership timeframe, to complete 3 speeches from the CC manual and 2 projects from the CL manual.

	OBJECTIVES	ACTIONS REQUIRED	TARGET TIMELINE	ACTUAL TIMELINE
1.	<i>Speech #1</i>	<i>Choose Topic</i>	<i>Nov. 07</i>	
		<i>First Draft</i>	<i>Nov. 10</i>	
		<i>Final draft</i>	<i>Nov. 18</i>	
		<i>Deliver Speech</i>	<i>Nov. 21</i>	
2.	<i>CL Project #4</i>	<i>Timer</i>	<i>Dec. 06</i>	
		<i>Grammarian</i>	<i>Dec. 13</i>	
3.	<i>Speech #2</i>	<i>Choose Topic</i>		
		<i>First Draft</i>		
		<i>Final draft</i>		
		<i>Deliver Speech</i>	<i>Jan. 12</i>	
4.	<i>CL Project #1</i>	<i>Ah counter</i>	<i>Dec. 20</i>	
		<i>Evaluator</i>	<i>Jan. 05</i>	
		<i>Grammarian</i>	<i>Jan. 19</i>	
5.	<i>Speech #3</i>	<i>Choose Topic</i>		
		<i>First Draft</i>		
		<i>Final draft</i>		
		<i>Deliver Speech</i>	<i>Feb. 25</i>	

# EXAMPLE FORMS

MENTORING SESSION RECORD (Example)		
Mentee: <i>Robert</i>		Date: <i>October 15</i>
	Sample questions & discussion ideas	Notes & Comments
<b>REVIEW</b>	<ul style="list-style-type: none"> <li>- The last time we met, you committed to ...</li> <li>- How is that coming?</li> <li>- How did you feel about your meeting role at the last Toastmasters Club meeting?</li> <li>- What did you learn?</li> <li>- What will you do differently?</li> </ul>	<p><i>First draft of Speech #2</i>  <i>-not ready yet, will do for next week for sure.</i></p> <p><i>Grammarian – word not used much. Will choose an adjective next time.</i></p>
<b>EDUCATIONAL PROGRAM PROGRESS</b>	<ul style="list-style-type: none"> <li>- What projects have you completed in the CC Manual?</li> <li>- What projects have you partially completed in the CL Manual?</li> <li>- What projects have you completed in the CL Manual?</li> </ul>	<p><i>Icebreaker</i></p> <p><i>Project #1 –</i></p>
<b>LOOKING FORWARD</b>	<ul style="list-style-type: none"> <li>- What project are you working on next in the CC Manual?</li> <li>- What project are you working on next in the CL Manual?</li> <li>- What will you have done by our next mentoring session?</li> <li>- How can I help you?</li> </ul>	<p><i>Speech #2</i></p> <p><i>Project #1 - need to be Evaluator yet</i></p> <p><i>First draft - Speech #2</i>  <i>Email by Oct. 20</i>  <i>Provide feedback on first draft</i></p>
	Confirm our next session	<p>Meet by: Telephone? Face to Face? Email?</p> <p>Date: <i>Oct. 22</i></p> <p>Time: <i>7:30-ish</i></p> <p>Location: <i>Telephone</i></p>

# EXAMPLE FORMS

## MENTOR/MENTEE CONTRACT EXAMPLE

Right at the beginning the mentee and mentor will want to get to know each other and develop common expectations. Develop a shared vision for the partnership; how you will work together and for how long. This form will help you to make the expectations clear.

### Term of the relationship

A clear start and ending date encourages the pair to set clear objectives and manage the time they have together wisely.

Mentee Name: John Doe

Mentor Name: Jane Smith

Date Joined: April 1, 2018

Date of Agreement: May 12, 2018

Partnership begins on: May 12, 2018

Partnership ends on: Nov. 12, 2018

### How will we communicate? (Choose one or more options)

Face to Face meetings      how often? bi-weekly      When? Tuesdays 4:30

Telephone      how often? As needed      When?

Email      how often? As needed      When?

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Mentee Signature: \_\_\_\_\_ Mentor Signature: \_\_\_\_\_