MENTORING

THE NEXT GENERATION OF NONPROFIT LEADERS:
A PRACTICAL GUIDE FOR MANAGERS

AED
Center for Leadership Development

ABOUT THE ACADEMY FOR EDUCATIONAL DEVELOPMENT

Founded in 1961, the Academy for Educational Development (www.aed.org) is an independent, nonprofit organization committed to solving critical social problems and building the capacity of individuals, communities, and institutions to become more self-sufficient. AED works in all the major areas of human development, with a focus on improving education, health, and economic opportunities for the least advantaged in the United States and developing countries throughout the world.

ABOUT THE AED CENTER FOR LEADERSHIP DEVELOPMENT

Through exchange, training, and education opportunities, the AED Center for Leadership Development seeks to offer present and future leaders experiences to elevate their skills, stimulate their creativity, and enhance their impact and effectiveness. The Center leadership programs encourage civic responsibility and participation, grassroots development, networking, and coalition building. The Center focuses on programming in three areas:

- leadership training, drawing on the experiences of current initiatives to research, apply, and evaluate the best theories, practices, and resources for leadership development;
- equity and ethnicity, providing a safe and stimulating space for leaders to explore the significance of race and ethnicity in human interactions and to explore mechanisms to advance equity; and
- leadership, ethics, and faith, offering technical assistance services that draw on a range of ethical and faith traditions of the global community.

MENTORING

THE NEXT GENERATION OF NONPROFIT LEADERS: A PRACTICAL GUIDE FOR MANAGERS

AED
Center for Leadership Development

TABLE OF CONTENTS

FOREWORD v

ACKNOWLEDGMENTS vii

INTRODUCTION 1

BENEFITS OF MENTORING RELATIONSHIPS 3

LIMITATIONS AND BOUNDARIES 4

ESSENTIAL INGREDIENTS IN THE ADMINISTRATION OF A MENTORING PROGRAM 5

MENTORING IN LARGE NONPROFITS 6

MENTORING IN SMALL AND MID-SIZE NONPROFITS 7

THE ROLE OF THE SUPERVISOR 8

MAXIMIZING THE MENTORING RELATIONSHIP 9

BEST PRACTICES IN WORKPLACE MENTORING 11

CASE STUDIES 18

CONCLUSION 21

INVITATION TO PROVIDE FEEDBACK 21

APPENDIX 1 - MENTORSHIP BRAINSTORMING TOOL 23

APPENDIX 2 - LEARNING AND MENTORING PLAN 27

APPENDIX 3 - MODEL MENTORING AGREEMENT 29

BIBLIOGRAPHY 31

ENDNOTES 35

FOREWORD

The Academy for Educational Development is pleased to present this monograph outlining 12 best practices in workplace mentoring. It reflects findings from the New Voices National Fellowship Program, a human rights leadership development initiative funded by the Ford Foundation and administered by AED. We hope you find the ideas developed here and the tools provided to be provocative and useful. AED has a long-standing history of investing in the development of human resource capacity. We strive in our daily work to connect people and create change—by developing new leadership, strengthening institutions, and working collaboratively to improve the human condition. We believe mentoring is an important intervention that can enhance the effectiveness and broaden the perspectives of emerging leaders. It is also a process that organizations can use strategically to develop the capacities needed to achieve short- and long-range goals. We look forward to hearing your comments on this resource guide and learning about your efforts to foster the next generation of nonprofit leaders.

Stephen F. Moseley
President and CEO
Academy for Educational Development

ACKNOWLEDGMENTS

The author thanks the many individuals who contributed in one way or another to this publication. Several AED staff members reviewed the document and offered comments: Ivan Charner, Phillip Hesser, Sandra Lauffer, Mary Maguire, Pamela Paul, Terrance Pitts, and Bill Smith. We also received feedback from two members of the New Voices National Advisory Group, Christine Ahn and Pablo Eisenberg, and from two mentors at small nonprofits, Jay Gillen and Kica Matos. Denise Borders, Kica Matos, Michael Montaño, Mara Schlimm, and Bill Smith authored the case studies in mentorship, and several New Voices mentors and mentees contributed quotations about their experiences. Sandie Macdonald and Esther Miller took charge of design and layout. Jean Bernard served as copy editor. The author accepts responsibility for the final content.

Ken Williams
Director, New Voices National Fellowship Program
AED Center for Leadership Development
Academy for Educational Development

Cite as Ken Williams, *Mentoring the Next Generation of Nonprofit Leaders: A Practical Guide for Managers,* Washington, D.C.: AED Center for Leadership Development, Academy for Educational Development. Copyright 2005, All Rights Reserved.

INTRODUCTION

"For two people to share mind and heart, such sharpness severs metal, and the words of those sharing mind and heart, such fragrance is like orchids."

—COMMENTARY ON THE APPENDED PHRASES,
I CHING, TONGREN

Mentoring, when broadly conceived as guidance, instruction, and support, has been an honored tradition since ancient times. "Mentor" first appears as an important character in Homer's *Odyssey,* with responsibility for the care and instruction of Odysseus's son, Telemachus.[1] Centuries later, if we believe Plato's account, Socrates is wrongfully sentenced to death for what might have been termed "bad mentoring," for his alleged corruptive influence on the youth of Athens.[2] In ancient China, there emerged the tradition of the master sage or "Tzu," who guides followers, including political leadership, in the Way or "Tao" of truth. Among Hindus and Sikhs, there are many narratives describing the works of gurus who are sought out for guidance and example. Muslims turn to imams, Sufis to sheikhs, Jews to rabbis. Christians may have a favorite minister or a godfather or godmother. And in indigenous communities throughout the world, tribal or village elders have played a pivotal role in helping community members mature and face adaptive challenges. For most of recorded history, artisans have learned from one another through apprenticeship or association. And in the most common experience throughout the ages, parents and guardians have served as mentors for their children—guiding, protecting, teaching, and challenging them.

There has been a veritable "boom" in mentoring programs in the United States, based in schools, workplaces, and local communities. Schools have established one-on-one tutoring programs to improve academic achievement. Colleges and universities deploy academic advisors or peer mentors to support incoming freshmen. Medical schools offer residency training programs, pairing experienced physicians with medical students. Government agencies, large corporations, and associations integrate mentoring into human resource development processes and diversity initiatives, often using mentor-mentee matching systems.[3] And law firms and nonprofits offer internship opportunities, with guidance and support for young professionals seeking a jump start on their careers.[4] When broadly conceived, mentoring seems to be a universal phenomenon.[5]

In this monograph, we narrow the focus to explore the promise and potential of mentoring *within the nonprofit sector,* and we examine the transformative role that *formal or structured* mentoring relationships could play in strengthening the sector and developing talent. We define mentoring as a trusting, collaborative relationship in which there is a commitment of time and a series of interactions that contribute to the personal and professional development of one or more parties to the relationship. Usually one party has, in at least one respect, more experience, skill, knowledge, and/or a higher position than the other. However, both can learn and contribute to the quality of each other's life and work through a caring, respectful relationship. A formal agreement guides the learning process and defines the roles and responsibilities of the parties involved.

> *"I would not be here today without conscientious mentors. My mentor has not only given me tools and taught me skills, but she has become a lifelong partner and friend to work in social justice."*
>
> —DOUA THOR, MENTEE

BENEFITS
OF MENTORING RELATIONSHIPS

There are several reasons nonprofit organizations need to make mentoring a priority *today*. First is the need for succession planning and knowledge transfer as founder-executives, particularly those born during the Baby Boom, retire or exit from the sector.[6] Second is the need to retain diverse and creative individuals within social change movements, where salaries are low and competition for talent with corporations and government agencies is stiff. Third is the need for staff, particularly in small nonprofits, to develop a broad range of competencies, the capacity to wear "multiple hats" or to be a "jack-of-all-trades." And, finally, the short life cycles of projects and grants demand agility in moving employees to new roles.

Mentoring relationships can deliver a number of critical benefits to nonprofit organizations and their employees. They can accelerate learning and expand the overall competency base of staff. They can help assure organizational agility, flexibility, and resourcefulness in difficult times, drawing on the guidance of seasoned professionals. They can improve the quality of work products and services through the use of feedback loops. They can strengthen networks and build collaborative ties between the organizations or work units where mentors and mentees are based. And they can help protect nonprofits from unforeseen liabilities, as mentors help mentees assess risks and manage challenges. Mentorship fosters employee loyalty and commitment, improving morale while enriching organizational culture—making it more humane and accountable to community.[7]

"I enjoyed our relationship because it was a great cross-cultural and cross-generational experience."

—Alicia Contreras, Mentee

LIMITATIONS AND BOUNDARIES

Mentoring offers many benefits, but it also has noteworthy limitations. While it may give individuals a boost in competency or career development, staff should not expect mentoring to provide an inside track to promotion or a guarantee of advancement within the organization. Nor should mentoring offer access to company secrets, gossip, or proprietary information. Mentoring should not devolve into a gripe session about one's supervisor; nor should it become a substitute for psychotherapy. Confidentiality and respect for reputations are essential, and establishing clear objectives and guidelines at the beginning protects the interests of both the organization and the participants. **The primary objective of a workplace mentoring program is to develop the capacity of employees to serve a cause or a community well.**

> *"My mentor always incorporated me into important aspects of decisionmaking in preparation for me to one day become an executive director....she pushed me out of the tree, fully expecting me to fly, and her confidence in me kindled my own."*
>
> —LOULENA MILES, MENTEE

ESSENTIAL INGREDIENTS
IN ADMINISTRATION OF A MENTORING PROGRAM

Experts in mentoring often point to several key ingredients in the design of a successful mentoring program:

1. the support of organizational leadership for the concept and implementation of a mentoring program;
2. completion of a needs assessment and analysis of the opportunities and resources available to staff;
3. establishment of clear objectives and evaluation measures;
4. modest allocation of staff time to coordinate or administer the program;
5. some form of orientation or training for mentors; and
6. the use of structured agreements to define roles, norms, and procedures.

These elements are essential to any mentoring program that strives to develop and support employees methodically and effectively.

"The mentoring relationship is like an estuary: part salt water, part fresh, sometimes flowing in, sometimes flowing out, a meeting place for all kinds of different things, fertile, fluid, dynamic."

—JAY GILLEN, MENTOR

MENTORING IN
LARGE NONPROFITS

Large nonprofits (of around 50 employees or more) may borrow models, instruments, and resources related to mentoring from government agencies and corporations. A typical approach would be to distribute a "call for mentors" or survey of the interests and competencies of staff.[8] Employees who seek a mentor are then matched with mentors, based on learning interests, performance objectives, and a review of the bio-sketches or resumes of prospective mentors. A human resource officer usually manages a program of this sort, and both the mentors and mentees receive training and technical assistance throughout the life of the program.

For the large organization, mentoring consultant Kathy Wentworth Drahosz recommends mentor-mentee "energizers" or mixers along the way to sustain energy and enthusiasm, as well as a mid-course gathering to evaluate progress and make adjustments to the program.[9] Mentors may gain from peer support groups, conference calls, and/or a closed Listserv or bulletin board. And some may find it helpful to document the services they provide and the growth of a protégé in a portfolio or journal. The program should end with a celebration and comprehensive evaluation.

"One of my mentors taught me step by step how to write a grant proposal ...and the program I developed was funded."

—CLEMENTINE MSENGI, MENTEE

MENTORING IN
SMALL AND MID-SIZE NONPROFITS

Small and mid-size nonprofit organizations with more limited human resource capacity can also formalize and practice mentoring systematically. They can capitalize on what has been learned about mentoring in other contexts and address concerns about organizational survival or time management in a way that makes structured mentoring a realistic, strategic investment in staff rather than a luxury or distraction from mission-critical work.

For these organizations, formal *external* mentoring relationships can serve a variety of functions: increasing the employee's knowledge of an issue, community, or movement; training or coaching the employee in a specific skill or competency; counseling the employee through a set of leadership challenges; supporting the employee in the design, implementation, and evaluation of a project; etc. Sometimes it is enough to tap a senior leader in the field or a trainer in the community. In other situations, the employee may benefit from access to a mentoring *team* or advisory group.

We suggest that small and mid-size nonprofits use a straightforward approach to mentoring:

1. encourage each employee to "contract" with at least one external mentor per year, with an option to change mentors if needed;
2. authorize staff to spend *at least* two to four hours per month out of the office, in dialogue or interfacing with their external mentors;
3. use written plans and agreements to focus learning and mentoring in a strategic way;
4. assign a senior staff member, board member, or external consultant to oversee the initiative;
5. offer an orientation to each mentor by phone or face-to-face meeting; and
6. recognize mentors with a modest honorarium, a note in the organization's newsletter or annual report, or an invitation to lunch with staff.

Taking these steps will help to ensure that staff and mentors are clear about their roles and experience mentoring as a productive, fulfilling enterprise.

THE ROLE OF THE SUPERVISOR

Though we encourage the use of external mentoring relationships, we do not mean to downplay the role of an employee's supervisor or the importance of maximizing an organization's internal resources. Supervisors and other staff often serve as *informal* mentors, and they make many contributions to the personal and professional development of those they oversee or support. For example, they:

- Provide an orientation to the organization or its programs and services.
- Brainstorm solutions to problems.
- Give feedback on performance and work products.
- Create opportunities for interesting work.
- Provide support to enable employees to take advantage of professional development opportunities.
- Link employees with other resources.
- Serve as a reference or write letters of recommendation.
- Protect employees from burnout.

These are some of the ways supervisors play a pivotal role in the professional development of personnel. However, employees often need someone outside the supervisory context with whom they can work and in whom they can confide about broader concerns or personal development issues. They often need a safe place where they can be vulnerable and explore ideas and plans freely. **We suggest that almost every nonprofit professional would benefit from at least one external mentor.**

It is important that the mentee's supervisor support and contribute to the mentoring relationship as much as possible. He or she can do this by providing input and suggestions for the mentoring plan and agreement, approving the employee's requests to meet with a mentor when they do not interfere with mission-critical work, and offering written feedback on the mentee's work performance for confidential discussion within the mentoring context.

MAXIMIZING THE MENTORING RELATIONSHIP

Mentors and mentees can maximize their learning partnerships in a variety of ways. First and foremost, it is important for the mentee to select a mentor carefully and for the administrators of the program to make sure, based on available information, that it is a "good match." Mentees should have the opportunity to interview or meet with their prospective mentors before they complete a formal agreement.

The ideal mentor is a good listener and strategist, has valuable knowledge and teaching capacity, can serve as a good role model, and both affirms and challenges the mentee. The mentor is also accessible and committed to the success of the relationship. The ideal mentee takes initiative and comes to meetings prepared, has realistic expectations, is open to feedback, and is willing to work hard to develop new competencies.

In the nonprofit sector, the most common barrier to formalized mentoring is the time commitment for both mentor and mentee. But it is possible to overcome this challenge by setting clear objectives and realistic parameters in advance. Participants should limit the exchange to a set number of hours each month, specify a regular appointment time (e.g., the first and third Fridays of each month), and establish a protocol for handling scheduling conflicts. These steps will lay the foundation for a productive exchange.

> *"I discovered that my mentee is actually my peer, and in many ways is better than I when it comes to policy analysis and development."*
>
> —LILLIAN GALEDO, MENTOR

BEST PRACTICES

1 IMPROVE OR SUPPLEMENT EMPLOYEE ORIENTATION

2 APPRECIATE AND DEVELOP CHARACTER

3 DEVELOP SPECIFIC SKILLS OR COMPETENCIES

4 DISCUSS ISSUES, IDEAS, CHALLENGES, AND CURRENT EVENTS

5 OFFER DEVELOPMENTAL OR "STRETCH" ASSIGNMENTS

6 EXPAND THE MENTEE'S NETWORK

7 IDENTIFY OTHER LEARNING OPPORTUNITIES AND RECOMMEND RESOURCES

8 MANAGE RISK-TAKING AND IDENTIFY DANGERS OR "MINEFIELDS"

9 EXPLORE CAREER OPTIONS AND THE LONG-TERM FUTURE

10 SEEK RECIPROCITY AND DEFINE MUTUALITY

11 IDENTIFY MORE THAN ONE MENTOR AS A RESOURCE TO THE MENTEE

12 DEVELOP A LEARNING AND MENTORING ACTION PLAN AND FORMALIZE A WRITTEN AGREEMENT OUTLINING GOALS, TERMS, AND BOUNDARIES

BEST PRACTICES

IN WORKPLACE MENTORING

Since 1999, AED staff associated with the New Voices National Fellowship Program, a human rights leadership development initiative, have been researching and promoting a number of best practices in workplace mentoring. The research entailed reviewing more than 500 mentoring plans submitted by small nonprofits throughout the country in connection with an annual grant competition. It also encompassed review of the literature on workplace mentoring. The end result has been identification of the 12 best practices outlined below. Some of these approaches can be used to improve internal supervisory relationships; all can serve to guide the formation of structured, external mentoring relationships.

BEST PRACTICE 1: IMPROVE OR SUPPLEMENT EMPLOYEE ORIENTATION

Nonprofits can address the mentoring gap in part by improving their approaches to and systems for orienting new employees. Introducing the history, mission, and culture of the organization; explaining its policies, procedures, and plans; demonstrating its internal management systems; and defining the roles of board members and staff are important steps in preparing the employee for full participation in the life of the organization. One option is to create an employee manual, orientation package, or protocol. Another is to encourage new staff members to conduct "informational interviews" of leaders and stakeholders in the organization, community, or movement. **A mentor can play an important role in this orientation process** by offering an introduction to a specific field or subject area, giving an overview of a particular social movement, or facilitating a site visit to a key organization in the local community. The mentor can help illuminate the historical, sociopolitical, and environmental context for the organization's work and the mentee's leadership efforts.

BEST PRACTICE 2: APPRECIATE AND DEVELOP CHARACTER

For the past 20 years or so, major corporations have seen the value of helping employees grow in self-knowledge, in awareness of their strengths and weaknesses. Some have even gone so far as to define specific characteristics or traits they seek in making decisions about advancement to upper management (e.g., productivity, creativity, collegiality, etc.). Consultant groups have emerged with sophisticated assessment tools, including "360-degree" feedback devices that solicit input from supervisors, peers, and supervisees. Unfortunately, most of these resources were designed for the manufacturing or sales environment rather than the nonprofit context. But there are some notable exceptions. Nonprofits could easily adapt the *Leadership Practices Inventory* designed by Kouzes and Posner,[10] the *Emotional Competence Inventory* (ECI-360) published by the Consortium for Research on Emotional Intelligence in Organizations,[11] or the assessment tool provided by Napolitano and Henderson in the back section of *The Leadership Odyssey*.[12] These three leadership assessment tools can be suitably applied to the nonprofit context.

Some organizations may want to consider developing their own feedback instrument, with assistance from a consultant in organizational leadership and management and/or with input from a variety of stakeholders, including the organization's board of directors. The challenge is to create a tool that affirms employee strengths, uncovers liabilities or areas for improvement, and places high value on the diversity of staff. Some organizations may prefer to use an open-ended process—assessing strengths and weaknesses, without creating a list of desired traits, by integrating feedback related to character into the performance appraisal process. For example, the performance appraisal could ask the employee's supervisors, peers, supervisees, and clients to list the employee's top three strengths and top three weaknesses in rank order. **The supervisor and an external mentor then review and discuss this feedback with the employee.**

Mentors, whether internal or external to the organization, play a pivotal role in establishing feedback loops and in offering advice on how the employee can best leverage his or her strengths and address weaknesses. For example, a mentor can create a safe space in which to discuss personal values, problems related to the way the mentee affects others, or personal experiences of transformation. The mentee may learn that he or she needs to take more initiative, practice patience, or deploy a sense of humor more often. The two can then create an action plan for personal development. **Mentoring builds character through shared insight.**

"We met regularly to evaluate any challenges to my work and to review my plans for moving forward to make sure I was on track."

—Barry Joseph, Mentee

BEST PRACTICE 3: DEVELOP SPECIFIC SKILLS OR COMPETENCIES

Another way to focus the mentoring relationship is to hone a specific set of skills or competencies. Most nonprofit leaders need a broad range of skills. These include strategic planning, media relations, research and evaluation, community organizing, policy advocacy, group facilitation, public speaking, fundraising, budgeting, time management, interpersonal communications, and many others. A skill- or competency-focused mentor supplements training and professional development activities by supporting the mentee with one-on-one coaching, role plays, and discussion of case studies, and by arranging opportunities to observe and learn from others. In some cases, it may be necessary to engage a board member, consultant, or external training resource in this learning process. The key is to build the knowledge, capacity, and confidence of the mentee.

BEST PRACTICE 4: DISCUSS ISSUES, IDEAS, CHALLENGES, AND CURRENT EVENTS

Strategic conversations play a central role in any mentoring relationship. The mentor often serves as resource person or sounding board. The discussion may explore hot topics in a field or subject area, current events (news items) in the local community or nation, dimensions of effective leadership, ideas for changes in public policy, and issues related to diversity (i.e., gender, race, orientation, disability, etc.).[13] The mentee may also seek assistance in tackling a specific challenge or problem (e.g., work/life balance). The mentor serves as a partner in dialogue, but the exchange is reciprocal and open to mutual influence. Both the mentor and mentee learn from one another. The conversation deepens the knowledge of each even as it broadens the perspective of each.

BEST PRACTICE 5: OFFER DEVELOPMENTAL OR “STRETCH” ASSIGNMENTS

A developmental or “stretch” assignment is one that challenges the employee to go beyond his or her current level of comfort and expertise and enter uncharted territory for the sake of professional development. The undertaking facilitates learning and develops leadership while simultaneously advancing the strategic interests of the organization. Possible assignments include leading a team or task force, managing a new project, writing a report, designing a service-delivery system, or assuming a new role such as supervisor or facilitator. Whatever the task, a mentor provides strategic support and feedback throughout the enterprise. Stretch assignments help employees grow personally and professionally *and* build their resumes over time.

BEST PRACTICE 6: EXPAND THE MENTEE'S NETWORK

Mentors often play a facilitative or connective role. They introduce a mentee to key contacts in the field or community, provide shadowing opportunities, include the mentee in strategy sessions with experts, and relay information about professional networking opportunities. As noted earlier, one approach is to encourage the employee to conduct in-person informational interviews as part of a general orientation to the work or as a learning process. Another is to encourage the employee to conduct site visits to "benchmark" model organizations or programs. Recommending professional conferences or community gatherings facilitates new linkages and increases the mentee's exposure to diverse ideas, perspectives, and resources. There may also be a professional association or peer group worth joining.

Given the ease of e-mail and web-based communications, some contacts may be made through virtual or online networking. There is increasing experimentation in both the public and private sectors with *cybermentoring* (via e-mail, bulletin boards, web-logs, etc.) and mentoring by telephone.[14] Whatever the mechanism, the goal is to assure that the mentee is supported by a rich and varied web of resources. Distance need not be a barrier to the learning process.

BEST PRACTICE 7: IDENTIFY OTHER LEARNING OPPORTUNITIES AND RECOMMEND RESOURCES

In addition to conferences and networking venues, the mentor may know of workshops, seminars, and courses available to individuals in the field or community. Then there are the "hard" resources such as books, articles, reports, subscriptions, and audio-visual materials. In the mentor's view, some of these may constitute "essential" reading or viewing, fundamental to or critical for basic knowledge and competency. In addition, there may be web sites of which individuals working within the subject area or community should be aware. A good mentor is "resourceful," even though he or she may often need to make a good referral or resource recommendation rather than offer a direct or complete answer.

BEST PRACTICE 8: MANAGE RISK-TAKING AND IDENTIFY DANGERS OR MINEFIELDS

Work in almost any social change movement, community, or service-delivery system is fraught with "minefields" and dangers. It may be that the organization has made a few enemies along the way or vies with competitors, or that staff work needs to reflect particular sensitivities. One of the most important roles of the mentor is to protect or guide the mentee, without preventing him or her from making mistakes and learning from them. It is often fruitful to assess risks and anticipate trouble spots in advance. This sort of exchange helps a mentee develop sound judgment and valuable sensibilities.

BEST PRACTICE 9: EXPLORE CAREER OPTIONS AND THE LONG-TERM FUTURE

Mentors often play a pivotal role in helping mentees assess their career options, develop concrete plans, and map out an appealing future. Mentors can serve as sounding boards, catalysts, and companions on the journey. This career-related support may occur through informal conversation or through a more structured process of exploration. The latter involves the use of career-related resources, assessment tools, and research. For example, the mentor may recommend joint discussion of a book such as Richard and Mark Bolles's *What Color Is Your Parachute?* or Po Bronson's *What Should I Do with My Life?* Or the mentee might complete the *Strong Interest Assessment Tool*.[15] These are three excellent resources for career discernment. Finally, it may be appropriate to conduct research on university academic programs or other credentialing opportunities.

"By formalizing my support role in this way, it increased my thoughtfulness to the person and the relationship. I think everyone should have mentors helping to support their growth and progress in their work. I wish I'd had a mentor myself, when I first started this work."

—KATE TITUS, MENTOR

BEST PRACTICE 10: SEEK RECIPROCITY AND DEFINE MUTUALITY

As suggested earlier, the ideal mentoring relationship involves some degree of reciprocity and mutuality. It may just be that the mentor wants to give back or to have a legacy. In *The Connective Edge,* Jean Lipman-Blumen refers to mentoring as a form of "vicarious" leadership, a way leaders expand their impact exponentially.[16] In some cases, the mentor needs the mentee's help to complete a project. Or the mentor finds that he or she masters his or her field more completely by teaching. Whatever the circumstances, the partnership is always a collaborative venture with mutual benefit to each participant. Often the mentee becomes aware of resources, opportunities, and emerging trends and brings this information to the mentor. Or the mentee brings a fresh perspective and vitality to the work. The exchange helps both grow personally and professionally, and articulating or restating the mutual benefits of the relationship over time helps to deepen and strengthen it.

BEST PRACTICE 11: IDENTIFY MORE THAN ONE MENTOR AS A RESOURCE TO THE MENTEE

An employee may need or benefit, throughout his or her career, from more than one mentor. At one point the employee needs a mentor who is an expert in the field of practice or who knows the local community. At another, the employee benefits from having a skill-focused coach. Later on, the employee wants an advisor to guide a challenging project or assignment from inception to completion. And, during key transitions, the employee seeks a mentor who can assist with career planning.

> *"My mentee challenged me to do better—to work with more intention, to be articulate about my ideas, to walk my talk, and to remember that the relationships we build through our work are the core of what our organization's work is all about."*
>
> —RACHEL HERZING, MENTOR

The Center for Venture Education's Kauffman Fellowship Program offers an interesting case study in the systematic use of multiple mentors or mentoring teams. The program seeks to develop the next generation of venture capitalists, and each participant has an Alumni Mentor, Firm Mentor, Academic Mentor, Financial Mentor, and Legal Mentor, each serving a unique function. The program's mentees are surrounded by a comprehensive network of human resources.[17]

One might envisage analogous support systems for employees of small nonprofits, where "human capital" is in short supply. Creative networks and learning partnerships often occur informally, but they could be formalized as part of a comprehensive leadership development or knowledge management strategy. Supervisors could play a connective role, linking their staff with external mentors to facilitate the exchange of ideas and timely learning. And employees would benefit from a "wrap around" network of resources, supports, and services.

Best Practice 12: Develop a Learning and Mentoring Action Plan and Formalize a Written Agreement Outlining Goals, Terms, and Boundaries

Nonprofits should experiment with structured Learning and Mentoring Plans (LAMPs). These outline areas for growth or competencies to be developed, the mentee's learning needs and interests, performance objectives, and outcome measures. They also capture the strategies and activities that will be used to foster learning; they list alternative or multiple mentors to engage; and they commit participants to specific time frames. We provide a tool for brainstorming mentoring activities in Appendix One and a template for constructing a Learning and Mentoring Plan in Appendix Two.

Agreeing in writing to work with one another is an excellent way to address critical questions in advance, such as the scope of mentoring assistance, meeting logistics, level of interface with the mentee's supervisor, confidentiality, and what to do if the relationship is not working out. The learning contract helps keep each party accountable to the other. Appendix Three offers a template for executing a formal, written mentoring agreement.

CASE STUDIES

ACADEMY FOR EDUCATIONAL DEVELOPMENT

The Academy for Educational Development (AED) is a large social change nonprofit with more than 1400 employees worldwide. In June of 2002, the institution began pilot-testing a mentoring program, using an internal mentor-mentee matching system.

Executive Vice President William Smith mentored Program Officer Sandra MacDonald, who was interested in social marketing. Dr. Smith is one of America's experts on the application of modern marketing to social issues such as infant mortality, HIV/AIDS prevention, and environmental protection. Over the course of eight weeks, Bill and Sandra worked with another young AED staff member, Gregory Valadie, to learn about social marketing by practicing it. The final product was an initiative called "The Voice of Arab Youth" (VoAY). The VoAY concept received wide public attention for its innovative emphasis on youth development and leadership. Today Sandra is managing a large youth exchange program for Middle Eastern students, and Gregory is applying his experience to adapt VoAY to the needs of Morocco. Sandra received an award for her creativity and leadership.

Mara Schlimm, a program officer with the AED Center for International Exchanges, provided mentoring support to Emily MacDonald, a program assistant in the AED Center on AIDS & Community Health. The two met every two weeks to discuss general professional development strategies, networking opportunities, and long-term career goals. Mara offered tips on grant proposal development (a topic of interest to Emily) and shared some of her contacts in the public health community. She also loaned Emily a few books on managing people, as Emily had recently assumed responsibility for training new program assistants and supervising temporary staff employed by her project. Finally, the two discussed the importance of recognizing one's own accomplishments and expertise and valuing the unique contributions they were making to their respective work units.

Denise Glyn Borders, Senior Vice President and Director of AED's U.S. Education and Workforce Development Group, mentored Brenda Arrington, a senior program officer with the AED Global Education Center. Brenda was pursuing her doctorate at the time the two met, and she credits Denise with giving her a broad perspective on the importance of completing an advanced degree. Denise shared real life situations where a sound educational foundation created significant options for career growth. Over the course of eight months, Brenda and Denise set clear goals and objectives and met regularly each month. Initially, they focused on helping Brenda set five-year goals in several categories (professional, family, community, spiritual, etc.) The importance of finding a balance between work and family, and the challenge of being a female and professionally driven, were significant backdrop issues for many conversations.

After identifying new professional goals, the two focused on developing leadership skills. They discussed the importance of professional demeanor in the workplace and of being aware of and committed to the mission of AED, the larger organization. They discussed the importance of taking on challenging assignments in one's current position, of developing strong working relationships and networks, and of constantly preparing to assume greater responsibility. Brenda notes that one of her most valuable insights was in recognizing the way her work within the AED Global Education Center contributes to the broader vision of AED. She now strives to serve not only the needs of her particular work unit, but also the needs of the larger organization. Brenda completed her doctorate in October 2004.

The participants in each of the mentoring relationships described above structured their exchange with a written agreement or "contract" articulating learning objectives, logistics, and timelines.

JUNTA for Progressive Action

Michael Montaño and Executive Director Kica Matos have worked together over the past year to design a comprehensive mentoring support system that seeks to help Montaño in each aspect of his work by drawing on leaders in the community with different areas of specialization.

Matos, Executive Director of JUNTA and Montaño's direct supervisor, serves as his Primary Mentor. Her role is to help Montaño develop an understanding of nonprofit management and community organizing work, offering opportunities for him to cultivate and practice his leadership skills. Thanks to both nurturing and "tough love," Montaño has gone from being a new hire to filling a public leadership role within the organization and the community at large. Matos's mentoring has included training in internal matters such as program design and nonprofit administration, as well as external matters such as building relationships with community leaders and local constituents. Matos has also assured that Montaño has opportunities to assume a high profile in the community, sometimes tackling volatile issues such as local labor, immigration, and banking policy. She encourages Montaño to serve as a spokesperson and facilitator for the organization by developing and delivering public testimony and engaging community members in advocacy efforts. As a result, Montaño is now called on independently to speak on a range of public concerns.

Brett Dignam, Professor of Clinical Studies at Yale Law School, is Montaño's 1st Adjunct Mentor. Dignam helps Montaño take advantage of the intellectual resources available in New Haven, particularly at Yale Law School. She has encouraged Montaño to develop critical and strategic thinking capabilities by providing input and feedback in the envisioning of new initiatives. She is a rigorous coach, often pressing Montaño to recognize weaknesses in strategy, consider alternatives, and think carefully about the motivations, processes, and outcomes of his work. She also connects him with individuals who can provide the research data or technical expertise needed to bring his ideas to fruition. Finally, removed from JUNTA's day-to-day operations, Dignam serves as a safe refuge when Montaño needs to work out challenges in professional relationships at work or in the community.

Paul Wessel, Director of Traffic and Parking and former Deputy Director of Economic Development for the City of New Haven, is Montaño's 2nd Adjunct Mentor. Wessel offers political advice in "navigating" governmental systems and working with local personalities. When Montaño is looking for a way to move his agenda through the city's bureaucracy, Wessel is there as a support and guide. Wessel helps Montaño preserve a sense of integrity and direction by bringing Montaño back to core values and principles.

Montaño meets separately with each of his mentors outside the office, and the exchanges typically last one to two hours. In addition, Montaño consults regularly with his mentors by phone and e-mail, addressing project-specific issues and securing general advice.

CONCLUSION

Today's fast-paced work environment requires state-of-the-art human resource development systems to assure that nonprofit organizations are making steady progress toward achieving their respective missions. External mentoring relationships can play a pivotal role in accelerating staff learning, improving overall performance and productivity, and enriching the program planning, implementation, and evaluation processes.

Nonprofit boards of directors should actively encourage experimentation with employee mentoring systems. They should introduce mentoring as a benefit to all employees and as an in-kind contribution to the organization. In addition, foundations and corporations should offer financial support to test new demonstration models in human resource development. The promise and potential of structured, external mentoring relationships remains a wide-open field for innovation and discovery.

INVITATION TO PROVIDE FEEDBACK

AED welcomes feedback on this monograph on mentoring. Please send your comments to: Ken Williams, Center for Leadership Development, Academy for Educational Development, 1825 Connecticut Avenue, Washington, D.C., 20009; fax number: 202-884-8407. E-mail: kwilliam@aed.org.

APPENDIX 1: MENTORSHIP BRAINSTORMING TOOL

This tool is designed to assist mentors and mentees in brainstorming options for collaboration. The activities are based on the best practices outlined in this monograph. Supervisors or informal mentors may also find this exercise helpful.

For the quarter beginning ____________ and ending ____________

A. Identify three ways you can improve or supplement the employee's orientation to the field, community, organization, etc.

1.
2.
3.

B. Using a self-assessment, 360-degree inventory, or a previous performance review, identify three traits or intrinsic strengths of the mentee to leverage and three weaknesses or areas for development.

Strengths:

1.
2.
3.

Weaknesses:

1.
2.
3.

C. Identify three competencies (knowledge areas or skills) to develop over the upcoming year.

1.
2.
3.

D. Identify three topics of mutual interest (issues, ideas, events, problems/challenges, etc.) for discussion.

1.
2.
3.

E. Brainstorm three possible developmental or stretch assignments.

1.
2.
3.

F. Networking: Identify contacts to make, informational interviews to conduct, shadowing opportunities, meetings in which to include the mentee, and other networking opportunities.

Contacts to make/informational interviews:

1.
2.
3.

Shadowing opportunities:

1.
2.
3.

Meetings or strategy sessions in which to include mentee:

1.
2.
3.

Other networking opportunities:

1.
2.
3.

G. Generate a list of opportunities or resources for each category below.

1. Conferences, workshops, seminars, courses:

2. Professional memberships, peer groups:

3. Books, articles, reports, subscriptions:

4. Web sites:

5. Listservs:

H. Identify three dangers or situations where caution and care are needed.

1.
2.
3.

I. Formulate together a long-term career objective or goal and the next three steps toward accomplishing it.

Objective:

Next steps:

1.
2.
3.

J. Identify three ways the mentor will benefit from the relationship.

1.
2.
3.

K. List other possible mentors for the employee and what the possible foci for learning and support will be:

1.
2.
3.

APPENDIX 2: LEARNING AND MENTORING PLAN

Review the ideas you have generated together through brainstorming, and decide which ones you will use in your Learning and Mentoring Plan (LAMP) for the upcoming quarter of your relationship. Brainstorm again and revise your plan at the end of each quarter.

Date:

Employee's Name:

Proposed Mentor(s):

Learning Objectives/Anticipated Outcomes:

Learning Strategies, Activities, and Opportunities:

Format, Frequency, and Duration of Interactions:

Employee's Signature: ______________________________

Mentor's(s') Signature(s): ______________________________

Please attach a curriculum vitae, resume, or short bio for the mentor(s).

APPENDIX 3: MODEL MENTORING AGREEMENT

We the undersigned agree to meet regularly to undertake the mentoring activities described in the attached plan and to allocate at least ________ hours per ________ to the mentoring relationship.

We will typically meet on the ________________________ of each month.

When there is a scheduling conflict, we will follow this protocol or process:

We agree to respect each other's confidentiality and reputations in our work together.

We will interface with the employee's direct supervisor in the following ways:

Mentor:

Mentee:

Other terms of our agreement are:

We will review and revise our learning and mentoring plan every three months.

Should the mentoring relationship not be working out for any reason, either party may withdraw. This is a "no fault" exit. The employee may identify an alternative mentor.

Either party may seek advice on improving the effectiveness of his or her mentoring relationship from: ____

(name, phone number, e-mail address).*

Mentor's Signature: ________________________________ Date: ____________________

Mentee's Signature: ________________________________ Date: ____________________

*This person should not be the mentee's direct supervisor.

BIBLIOGRAPHY

Bell, Chip R., *Managers as Mentors: Building Partnerships for Learning,* San Francisco, Berrett-Koehler Publishers, Inc., 2002.

Bolles, Richard N., and Bolles, Mark Emery, *What Color Is Your Parachute? 2005: A Practical Manual for Job Hunters and Career-Changers,* Berkeley, CA: Ten Speed Press, 2004.

Bronson, Po, *What Should I Do with My Life: The True Story of People Who Answered the Ultimate Question,* New York: Random House, 2002.

Brounstein, Marty. *Coaching and Mentoring for Dummies,* Foster City, CA: IDG Books Worldwide, 2000.

Douglas, C.A., *Formal Mentoring Programs in Organizations: An Annotated Bibliography,* Greensboro, NC: Center for Creative Leadership, 1997.

Drahosz, Kathy Wentworth, *The Keys to Mentoring Success,* Montclair, VA: The Training Connection, 2004.

Dreher, G., and Ash, R., "A Comparative Study of Mentoring Among Men and Women in Managerial, Professional and Technical Positions," *Journal of Applied Psychology* 75 (1990): 525-535.

Fritts, P., *The New Managerial Mentor,* Palo Alto, CA: Davies-Black, 1998.

Galbraith, M.W., and Cohen, N.H., *Mentoring: New Strategies and Challenges,* San Francisco: Jossey-Bass, 1995.

Goleman, D., *Emotional Intelligence: Why It Can Matter More than IQ,* New York: Bantam, 1995.

Grossman, J.B., *Contemporary Issues in Mentoring,* Philadelphia: Public/Private Ventures, 1999, available at www.ppv.org.

Hamilton, Mary Agnes, and Hamilton, Stephen F., *Learning Well at Work,* chap. 5, available at www.human.cornell.edu/youthwork/pubs/guide.pdf.

Hargrove, R., *Masterful Coaching,* San Francisco: Pfeiffer, 1995.

Harris, Angela; Delgado, Richard; and Stefancic, Jean, *Critical Race Theory: An Introduction,* New York: New York University Press.

Hendricks, W. (ed.), *Coaching, Mentoring and Managing,* New York: Career Press, 1996.

Huang., C., and Lynch, J., *Mentoring,* New York: HarperCollins, 1995.

Hudson, Frederick M., *The Handbook of Coaching,* San Francisco: Jossey-Bass, 1999.

Giber, D., Carter, L., and Goldsmith, M. (eds.), *Linkage Inc.'s Best Practices in Leadership Development Handbook,* San Francisco: Jossey-Bass, 2000.

Lipman-Blumen, Jean, *The Connective Edge: Leading in an Interdependent World,* San Francisco: Jossey-Bass Publishers, 1996.

McCall, Morgan W., Jr., *High Flyers: Developing the Next Generation of Leaders,* Boston: Harvard University Press, 1998.

McCauley, C., Moxley, R., and Van Velsor, Ellen (eds.), *The Center for Creative Leadership's Handbook of Leadership Development,* San Francisco: Jossey-Bass, 1998.

"Mentoring for Success," *Executive Update,* Washington, DC: Center for Association Leadership, November 1999.

Murray, M., *Beyond the Myths and Magic of Mentoring: How to Facilitate an Effective Mentoring Program,* San Francisco: Jossey-Bass, 1991.

National Council of Women's Organizations, *Women's Leadership Handbook,* Washington, DC: NCWO, 2000.

Northouse, Peter G., "Women and Leadership," *Leadership Theory and Practice,* chap. 12, Thousand Oaks, CA: Sage Publications, 2004.

Orth, C.D., Wilkinson, H.E., and Benfari, R.C., "The Manager's Role as Coach and Mentor," *Organizational Dynamics* 15(4) (1987): 66-74.

Parsloe, E., *Coaching, Mentoring and Assessing:* A Practical Guide to Developing Confidence, London: Kogan Page Limited, 1995.

Peterson, D.B., and Hicks, M.D., *The Leader as Coach: Strategies for Coaching and Developing Others,* Minneapolis, MN: Personnel Decisions, 1995.

Ragins, Belle Rose, "Gender and Mentoring Relationships: A Review and Research Agenda for the Next Decade," *Careers and the Quality of Life,* chap. 18.

Shea, F.G., *Mentoring: Helping Employees Reach Their Full Potential,* New York: American Management Association, 1994

Simmons, Kathy, "Growing a Successful Mentor Program," *Executive Update,* Washington, DC: Center for Association Leadership, December 1999.

Simonson, P., *Promoting a Development Culture in Your Organization,* Palo Alto, CA: Davies-Black, 1997.

Stone, F.M., *Coaching, Counseling and Mentoring,* New York: AMACOM, 1998.

Synergetic People Development, *Mentoring Works!*, a series of 13 articles on workplace mentoring, available at www.synergeticpeopledevelopment.com.au.

Thomas, David A., "The Truth About Mentoring Minorities: Race Matters," *Harvard Business Review,* April 2001.

Thomas, D.A., and Gabarro, J.J., *Breaking Through: The Making of Minority Executives in Corporate America,* Cambridge, MA: Harvard Business School Publishing, 1999

Tice, L., *Personal Coaching for Results: How to Mentor and Inspire Others to Amazing Growth,* Nashville, TN: Nelson, 1997

Wunsch, M., *Mentoring Revisited: Making an Impact on Individuals and Institutions,* San Francisco: Jossey-Bass, 1994.

Zachary, Lois J., "Creating a Mentoring Culture," *Executive Update,* Washington, DC: Center for Association Leadership, November 2002.

______________, *The Mentor's Guide: Facilitating Effective Learning Relationships,* San Francisco: Jossey-Bass, 2000.

ENDNOTES

[1] Homer's *Odyssey,* cf. especially Book 2: 249-342; Book 4: 720-738; Book 22: 209-325.

[2] See Plato's *Apology,* 23c-26b.

[3] The U.S. Department of State offers a good example of a government-sponsored mentoring program. See the *Civil Service Mentoring Program Guide,* DOS Publication 1128. For examples of corporate mentoring programs, see D. Giber, et al., *Linkage Inc's Best Practices in Leadership Development Handbook,* 2000.

[4] For a superb guide to mentoring relationships in the law firm context, see *Mentoring Across Differences: A Guide to Cross-Gender and Cross-Race Mentoring;* Minority Corporate Counsel Association, December 2003. A PDF version of the publication is available online at www.mcca.com.

[5] A key-word search on use of the term, "mentor," on the USAID, World Bank, and United Nations web sites yielded 427, 117, and 856 results, respectively. A Google search yielded more than 29 million entries (1,080,000 pages for "Asia mentor," 769,000 for "Africa mentor," and 386,000 for "Latin America mentor").

[6] One regional study found that 70 percent of nonprofit CEOs and executive directors planned to leave their posts over the next five years; *Executive Director Tenure and Transition in Southern New England,* New England Executive Transitions Project, January 2004; see also Pablo Eisenberg, "Solving the Nonprofit Leadership Crisis Will Take Much Work," *Chronicle of Philanthropy,* December 9, 2004, p. 44.

[7] See Lois J. Zachary, "Creating a Mentoring Culture," *Executive Update,* Center for Association Leadership, 2002.

[8] The needs assessment and matching process for a mentoring program can be facilitated by the use of online survey tools such as SurveyMonkey (www.surveymonkey.com) and Boomerang (www.boomerang.com).

[9] Kathy Wentworth Drahosz, *The Mentoring Connection,* 2004.

[10] Kouzes, James M., and Posner, Barry Z., *Leadership Practices Inventory: Deluxe Facilitator's Guide Package,* 3rd ed., San Francisco: Jossey-Bass, 2003.

[11] See the Consortium's home page at www.eiconsortium.com.

[12] Napolitano, Carole S., and Henderson, Lida J., *The Leadership Odyssey: A Self-Development Guide to New Skills for New Times,* San Francisco: Jossey-Bass, 1998.

[13] On gender, see references in the bibliography for G. Dreher et al, National Council of Women's Organizations, Peter Northouse, and Bella Rose Ragins. On race/ethnicity, see Angela Harris, et al, and David Thomas, et al. For corporate perspectives on diversity, see Diversity Inc. (www.diversityinc.com) and Diversity Best Practices (www.diversitybestpractices.com). For grassroots nonprofit perspectives, see Applied Research Center (www.arc.org), Center for Third World Organizing (www.ctwo.org), PolicyLink (www.policylink.org), and The People's Institute for Survival and Beyond (www.thepeoplesinstitute.org).

[14] See futurist Michael Zey, "Cybermentoring and Telementoring: Overcoming the Obstacles of Physical Distance," available at www.zey.com/Powerpoint/CyberMentoringfiles/frame.htm. The author lists six cybermentoring programs and proposes that companies may some day use virtual reality technology to guide and coach staff.

[15] However, currently there is no *comprehensive* inventory sufficient to explore career options in the nonprofit or social service sector.

[16] Jean Lipman-Blumen, *The Connective Edge: Leading in an Interdependent World,* 1996, p. 186.

[17] For more on the Kauffman Fellowship Program, see www.kauffmanfellows.org.

ACADEMY FOR EDUCATIONAL DEVELOPMENT

BOARD OF DIRECTORS

Edward W. Russell. *Chairman of the Board and the Executive Committee.** Former Senior Vice President, Governmental Affairs, J.P. Morgan Chase and Co.

Roberta N. Clarke. *Vice Chairman of the Board.** Associate Professor and former Chair, Department of Marketing, School of Management, Boston University

Stephen F. Moseley. President and Chief Executive Officer

Robert O. Anderson. Retired Chairman and Chief Executive Officer, Atlantic Richfield Company

J. Brian Atwood. Dean, Hubert H. Humphrey Institute of Public Affairs, University of Minnesota; former President, Citizens International; former Administrator, U.S. Agency for International Development

Sarah C. Carey. Partner, Squires, Sanders & Dempsey L.L.P.

Terence J. Fortune. *Secretary of the Corporation.** Of Counsel, Paul, Weiss, Rifkind, Wharton and Garrison

Harriet Mayor Fulbright. Former Executive Director, President's Committee on the Arts and the Humanities; former Executive Director, Fulbright Association

*Officers of the Board

Frederick S. Humphries. Regent Professor, Florida A&M University; former President, Florida A&M University

Frederick J. Iseman. Chairman and Managing Partner, Caxton-Iseman Capital, Inc.

Joseph S. Iseman. Of Counsel, Paul, Weiss, Rifkind, Wharton and Garrison

Walter F. Leavell. Health Advisor; former President, Charles R. Drew University of Medicine and Science

Sheila Avrin McLean. Strategy Consultant; former President and CEO, Boyden World Corporation; former President, Association of Executive Search Consultants

Rita M. Rodriguez. International Finance Writer, Researcher, and Advisor; former Member of the Board of Directors, Export-Import Bank of the United States

Adel Safty. UNESCO Chair of Leadership; President of the School of Government and Leadership, University of Bahcesehir, Istanbul

Alfred Sommer. Dean, Bloomberg School of Public Health, Johns Hopkins University

Niara Sudarkasa. Scholar in Residence, African-American Research Library and Cultural Center, Ft. Lauderdale, FL; former President, Lincoln University

AED CENTER FOR LEADERSHIP DEVELOPMENT
1825 Connecticut Avenue, NW, Suite 744
Washington, D.C. 20009
Phone: 202-884-8972 Fax: 202-884-8407
www.aed.org

AED
Academy for Educational Development
Connecting People > Creating Change