



Mentoring Workbook



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Your Cardea Community



CARDEA is a group (many of us HR Professionals) with a proven track record in the delivery of initiatives to support research staff within our own universities and organisations. Under the framework provided by the HR Excellence in Research initiative we work to improve policy and practice, recruitment and working conditions, and the training and development of research staff. Through CARDEA we will now leverage our experience to introduce policy and career practice guidelines for Research Managers in the European Research Area. [Meet the team](#)

Web Resources



CARDEA
Enabling professionalisation
of research management

Webpage: <https://www.ucc.ie/en/cardea/>



CARDEA Hub

Webpage: TBC

Webpage: <https://www.ucc.ie/en/cardea/cardeahub/>



Contact us: cardea@ucc.ie

1. Mentoring with Cardea

1.1 Welcome

Mentoring is not just a feature but a cornerstone of CARDEA, which is pivotal in developing research managers in the ERA. We deeply value the role of mentors in this process, recognising the significant impact they can have on the professional growth of our research managers. Your role as a mentor is not just important; it's essential. We understand that many institutions already have established mentoring schemes, and this material is specifically designed to complement and strengthen those existing structures, ensuring we can offer even more robust support for mentoring within your institution.

1.2 Setting up a mentoring scheme

How can you set up a mentoring scheme in your [institution](#)? Are there supports in place?

See [UCC Staff Wellbeing & Development](#)

1.3 Mentoring Commitment

The role of the mentor is to encourage the development of the delegate by providing mentees with information, advice, guidance and support. Ideally, the mentee will bring topics to the meeting that align with the mentoring arrangement, and the mentor will facilitate the learning process through questioning, examples, and information.

Mentoring as a concept:

M – Manages the relationship

E – Encourages

N – Nurtures

T – Teaches

O – Offers mutual respect

R – Responds to the mentees' needs

The mentor acts as a guide and sounding board but has no responsibility for the actions and decisions of mentees. Many institutions will have existing and well-structured protocols for mentoring. In such cases, the institutional scheme procedures and requirements will apply. However, suppose the institution has limited experience and capability. In that case, we want to reassure you that we have set out some tools and approaches that can be used in this document to support you in this process. We are here to provide the necessary support and guidance to ensure the successful establishment of a mentoring scheme in your institution. You are not alone in this; we are here to help. We are confident in your ability to establish a successful mentoring scheme with our support.

What is the difference between mentoring and [coaching](#)?

A Mentor:

- Advises & suggests
- Share knowledge and experience
- Leads by example
- Gives examples and ideas
- Is usually more experienced (than mentee)

A Coach:

- Creates space to think
- Challenges beliefs, thoughts and behaviours
- Facilitates self-discovery
- Draws out (from coachee) examples and ideas
- Need not be an expert

1.4 Benefits of Becoming a Mentor

Each circumstance and experience will differ depending on your relationship with the mentee. However, some of the general benefits of becoming a mentor include but are not limited to:

- Relationship management
- Communication skills development
- Listening/Active Listening
- Self-Reflection
- Leadership Development
- Networking

2. Defining Mentoring

The term mentor derives from Greek mythology, through Homer's writings in his poem The Odyssey. A mentor was considered a guide, a teacher, a tutor, and Odysseus' most faithful advisor.

Mentor: "A trusted counsellor or guide" (Merriam-Wester, 2024)

According to Arnesson and Albinsson (2017), mentoring is based on the mentee's goals, and the mentor acts in a supporting role. The mentor's role can vary significantly but should include emotional, psychological, or career-development support. Mentorship benefits both the mentor and the mentee. It should be both a rewarding and developmental experience, and the relationship between the mentor and mentee is personal.

2.1 The “Job Description” of a mentor

Each circumstance will differ based on the mentor and mentee’s expectations in the mentorship relationship. However, some of the critical tasks of a mentor include but are not limited to:

- The provision of information, guidance and support for mentees.
- Engage mentees to foster growth and development.
- Build confidence
- Identify barriers to growth and development
- Inspire, aspire and raise motivation.
- Identify areas for training and development.

The mentor becomes “ a crutch” for the mentee. The mentor aims to:

- Identify learning opportunities
- Provide a safe space to share
- Become a sounding board
- Become a role model
- Encourage self-reflection
- Encourage self-direction
- Motivate
- Inspire

The Mentor assists the Mentee in:

- Practicing, evaluating, and refining their ideas and processes in a supportive environment, allowing them to become confident and skilled professionals.
- Developing and enhancing self-awareness and interpersonal skills to improve their effectiveness in the workplace.
- Gaining a professional perspective to understand their work performance within the broader workplace and community context.
- Building self-evaluation abilities and independent learning skills, enabling them to maximise benefits from all learning experiences and proactively seek future learning opportunities.

2.2 Personal Attributes and Qualities for Effective Mentoring

Attitude:

- Available: Has sufficient time to dedicate to the mentee.
- Flexible and Open-minded: Adaptable and receptive to new ideas.
- Open: Willing to share personal experiences, be honest about themselves, and provide truthful feedback to the mentee.
- Enthusiastic: Genuinely interested in the mentee’s concerns, needs, goals, and aspirations.

- Empathic: Capable of understanding the mentee's thoughts, feelings, and behaviours.
- Positive in Outlook: Able to understand the mentee's perspective and find solutions.
- Supportive of Career Development: Committed to helping delegates develop their careers and particularly supportive of their mentees.

Skills:

- Good Listener: Fully attentive to the mentee without letting personal thoughts interfere.
- Motivating and Encouraging: Able to direct the mentee's energy towards positive change, new challenges, and overcoming obstacles.
- Balanced: Provides the right mix of challenge, encouragement, and support.
- Supportive Communication Style: Uses a coaching approach to communicate effectively.

Knowledge:

- Organisational Understanding: Knowledgeable and experienced within the organisation, familiar with its culture.
- Higher Education Experience: Possesses sufficient experience in higher education to offer valuable advice and support.

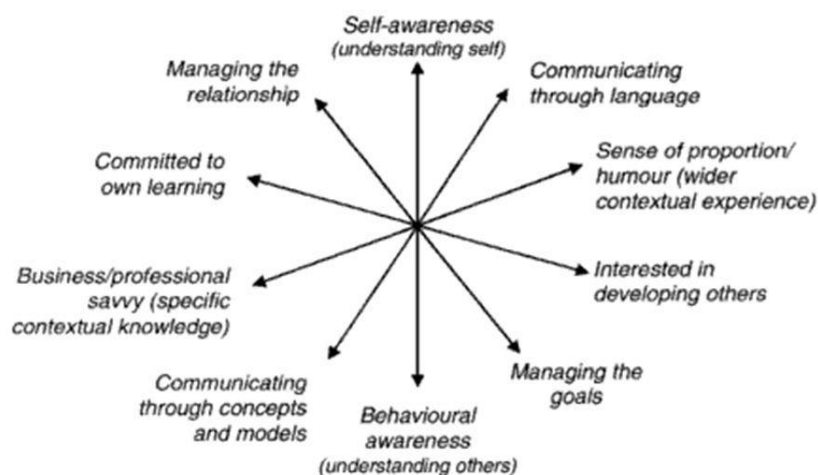
The mentor's role depends on applying a flexible and adaptive approach and fostering an environment where the mentoring relationship can thrive.

MENTOR COMPETENCES



the practice of mentoring will primarily depend on mentor competences

(Clutterbuck, 2004)



2.3 Key Mentoring Skills

Active Listening

Active listening involves fully concentrating, understanding, and responding thoughtfully to the mentee. It helps build trust and shows the mentee that their thoughts and concerns are valued.

Constructive Feedback

Providing constructive feedback means offering specific, actionable suggestions to help the mentee improve. This type of feedback should be balanced with positive reinforcement to encourage growth.

Communication

Effective communication is clear, concise, and open, facilitating mutual understanding. Good communication skills help articulate thoughts, provide feedback, and resolve misunderstandings.

Relationship Building

Building a solid mentoring relationship involves building trust, respect, and mutual understanding. This can be achieved through consistent and meaningful interactions.

Leadership

Exemplifying strong leadership involves guiding, inspiring, and supporting the mentee. Good leaders model behaviour that mentees can emulate and provide a vision for their growth and development.

Empathy

Empathy is the ability to understand and share the feelings of the mentee. It helps create a supportive and nurturing environment, making the mentee feel understood and valued.

Goal-Setting

Setting clear, achievable goals provides direction and purpose for the mentoring relationship. It helps both mentor and mentee stay focused and measure progress over time.

Action Planning

Action planning involves outlining specific steps to achieve the set goals. It provides a roadmap for the mentee, helping them stay organised and on track to reach their objectives.

3. Defining the Mentorship Process

3.1 Relationship Building

Establishing open and honest communication is crucial in the initial stages of building a mentoring relationship. Setting clear expectations and goals helps both parties understand the purpose and direction of the mentorship. Knowing each other's backgrounds, interests, and professional aspirations fosters trust and rapport. This foundation of mutual respect and understanding paves the way for a productive and supportive mentoring relationship.

**Please use the first meeting checklist tool to help establish the relationship.*

3.2 Boundary Setting

Setting boundaries in a mentoring relationship is essential for maintaining professionalism and mutual respect. Clearly defining the scope of the mentorship, including the frequency and mode of communication, helps manage expectations. It's essential to agree on confidentiality terms and respect each other's time commitments. Establishing these boundaries early on ensures a structured and productive relationship, allowing the mentor and mentee to thrive within agreed-upon limits.

**Please use the mentorship agreement to help you to establish the relationship.*

3.3 Setting expectations and working together

Setting expectations and working together involves clearly defining the goals and objectives of the mentoring relationship from the outset. Mentors and mentees should agree on their roles, responsibilities, and desired outcomes, ensuring alignment and fostering a collaborative and productive partnership.

3.4 Frequency and process of meeting

Mentors should meet with their mentee 4 to 6 times, for 40 minutes to an hour, spaced 2 to 4 weeks apart. The mentee is responsible for setting up meetings and defining the agenda. If the mentee has no core topics to discuss, focus on a recent teaching session. The mentee should do most of the talking, with the mentor offering thoughts and encouragement. Mentors should avoid giving directive advice unless it concerns safety, security, or compliance.

3.5 Effective endings

As the mentoring partnership nears its end, both parties should plan for a proper closure. Announce the impending end at the penultimate meeting to allow for mental preparation and necessary discussions. Handle the ending sensitively due to the personal and emotional nature of the relationship. In the final meeting, review progress, celebrate achievements, and share experiences to provide a sense of closure. If both parties see benefits in continuing the relationship, discuss potential forms it might take, whether as occasional acquaintances, friends, or a new mentoring cycle, with agreed-upon boundaries and expectations.

4. Templates

4.1 Sample Cardea Mentoring Agreement Template

This agreement between:

_____ Mentee

Start Date _____

_____ Mentor

Start Date _____

This agreement states that the mentee and the mentor commit to regular contact and the responsibilities outlined in the table below.

The Mentee:	The Mentor:
<ul style="list-style-type: none">• Shall be responsible for planning, booking an appropriate venue and setting the agenda.• Shall engage in the process and notify the mentor of the meeting agenda in good time.• Will not ask the Mentor to act on their behalf in any capacity outside of the mentoring relationship.• Will give suitable and helpful developmental feedback to the Mentor on how the process might be improved	<ul style="list-style-type: none">• Shall protect the required time and be available as agreed, giving the Mentee their undivided attention for the duration of the meeting• Will not discuss the contents of the meeting without consent with any other party unless they have serious, urgent concerns about the safety or legality of the mentee• Shall give honest feedback in a constructive and respectful way• Will act by best practice throughout the mentoring relationship

Dates and mode of communication are to be mutually agreed, and both parties agree to give at least 48 hours' notice of cancellation or rescheduling unless due to illness.

No-Fault Termination

We are committed to open and honest communication in our relationship. We will discuss and attempt to resolve any conflicts or issues as they arise. However, if one of us needs to terminate the relationship for any reason, we agree to abide by one another's decision.

Confidentiality

While this is an informal and voluntary relationship, the bounds of confidentiality should be agreed upon and articulated at the start of any relationship. Usually, mentoring conversations are confidential unless there is an issue relating to personal safety or legality.

Signed _____ Mentor Date

Signed _____ Mentee Date

4.2 First Mentoring Meeting Checklist Template

Personal <i>Build rapport by introducing yourself and gaining an understanding of the background of the mentee.</i>	
<ol style="list-style-type: none"> 1. What have been the key milestones in your career to date? 2. What has been your most outstanding achievement in your career so far? 3. What are your aspirations for the future? 4. What do you hope to gain from Cardea and the mentoring relationship? 5. Give a summary of the mentor's background, sharing appropriate levels of information. 	
Professional <i>Discuss the roles and responsibilities of both mentor and mentee. Define the scope of the relationship.</i>	
<ol style="list-style-type: none"> 1. What do you both think mentoring is? 2. What is expected from each of us? 3. What is not part of the relationship? 4. What is the purpose and aim of the relationship? 5. What is confidential, and what is not? What does confidentiality mean to both parties? 6. Role of respect and acceptance of difference? 7. Go through any Mentoring Agreement being used 	
Procedural <i>Define and agree on expectations for meetings, paperwork and timings.</i>	
<ol style="list-style-type: none"> 1. Who will arrange meeting locations (e.g., teams)? 2. What notice is required for cancellation? 3. Where will you meet, and for how long? 4. Discuss the role of personal responsibility and commitment 	

Psychological

Discuss how you can best work together. Agree on rules of confidentiality, giving feedback and how sessions will run.

1. How do both parties work best?
2. What does the mentor need to know to get the best out of the mentee?
3. Role of challenge, honesty and appropriate and relevant disclosure amount.
4. What are the rules for giving feedback? What if you encounter issues or problems?

