



# The Next Generation: A Handbook for Mentoring Future Union Leaders





INSTITUTE FOR  
WOMEN'S POLICY RESEARCH

The  
Berger-Marks  
Foundation



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The Institute for Women's Policy Research (IWPR) conducts rigorous research and disseminates its findings to address the needs of women, promote public dialogue, and strengthen families, communities, and societies. The Institute works with policymakers, scholars, and public interest groups to design, execute, and disseminate research that illuminates economic and social policy issues affecting women and their families, and to build a network of individuals and organizations that conduct and use women-oriented policy research. IWPR's work is supported by foundation grants, government grants and contracts, donations from individuals, and contributions from organizations and corporations. IWPR is a 501(c)(3) tax-exempt organization that also works in affiliation with the women's studies and public policy programs at The George Washington University.

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## About The Berger-Marks Foundation

The Foundation was established with a bequest from the estates of Edna Berger, the first female lead organizer for The Newspaper Guild-CWA, and her husband, the legendary Tin Pan Alley song writer Gerald Marks.

We seek to bring the benefits of unionization to working women and to assist organizations committed to those principles. The goal is to provide financial assistance to women who are engaged in union organizing and to assist working women who want to organize other women into unions through training, research and other resources.

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# Foreword

I was one of the lucky ones. Almost from the moment I joined The Newspaper Guild-CWA back in 1978, I was the beneficiary of hands-on guidance from an array of mentors whose experience helped point me toward 30 years of activism and leadership in the labor movement. But in my case, it was just luck. No one set out to regularly check on my progress. No one was making sure I sought and followed advice of wiser colleagues. By sheer chance, I encountered the right people at the right time to help me succeed.

Once I became national president of the Guild, I soon discovered that ensuring a future for my union and the causes I cared so deeply about required a new generation of leaders who likewise needed guidance of experienced leaders. Unfortunately, too few of us in charge had the time or could make the time to provide consistent mentoring and coaching.

*The Next Generation* aims to help unions and other organizations incorporate leadership development into their regular scheme of work. The Institute for Women's Policy Research has compiled a basic, yet detailed, how-to manual for setting up and executing an effective mentoring program. Replete with "best practice" examples from mentoring programs that actually work, this manual can be used to begin a mentoring program from scratch or shore up one that's already in place. Using the manual's tools for two-way communication and appended forms for measuring mentoring progress will ensure that efforts to develop new leadership are sustained, even as individual leaders themselves move on. As the handbook points out, a mentoring program is really an ongoing internal communications program.

Having spent most of my adult life as an operative at various levels of the union movement, I know firsthand that politics, not necessarily training or experience, ultimately determines who becomes president, secretary-treasurer or other top union decision-maker. Unions, after all, are democratic institutions by law. However, I also know many, many leadership positions in unions aren't elective. The success of these leaders, as well as elected officers, depends on having committed, trained and confident activists in line to fill positions at all levels, as they become vacant.

Unfortunately, the nature of social justice work, including trade unionism, doesn't always lend itself to on-the-job training. Systematic access to good advice and non-judgmental evaluation by other activists and leaders is essential for the development of future activist leaders.

It is in this time-honored trade union spirit of "Pass It On" that the Berger-Marks Foundation invites you and your organization to delve into *The Next Generation*. In today's complex and difficult economic environment, we can't leave tomorrow's leadership to chance.

*Linda Foley,  
President, The Berger-Marks Foundation  
Former President, The Newspaper Guild-CWA*

Linda Foley, left, and Ana Maria Archila, Co-Director of Make the Road New York (MRNY), the winner of the First Annual Berger-Marks Edna Award.

The Edna Award honors a young woman leader in the social justice movement who has made an extraordinary contribution early in her career, and whose achievements indicate that her work will continue to significantly improve the lives of working women and men.





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# I. Introduction

This handbook provides an overview of how to mentor union members or staff. It draws on literature on mentoring in unions and other settings as well as interviews with ten individuals who have mentored or been mentored in unions. The handbook is intended primarily for union leaders and for those who want to develop union members and staff to keep unions strong. Much of the information the handbook contains, however, is applicable to any not-for-profit organization.

Leaders within the labor movement have mentored their successors—mostly informally—since the movement began, but some union leaders believe this mentoring has been more readily available to men. Mentoring, however, may be especially valuable for women and people of color because of the specific challenges they face in advancing their careers. Mentoring can help unions diversify their leadership. This handbook examines the positive aspects of mentoring and provides a resource for expanding mentoring to take into account the diversity of the labor movement. Women and people of color are critical to the future of the labor movement, and developing their leadership potential is a key to its success.

Mentoring in unions can provide a way for current leaders to help new leaders develop and grow.

## II. What Is Mentoring?

Mentoring is a professional relationship devoted to developing a person’s career. It involves a “mentor” (trusted advisor or teacher) and “mentee” (learner or protégé). Traditionally, people have understood mentoring as a relationship between an older, more experienced mentor and a younger, less experienced colleague. Mentoring, however, can also happen between peers at a similar level within an organization. And it can be a two-way process between individuals of different ages: older mentors can learn new skills from their younger mentees (such as ways to use technology) and come to see the union from a different perspective. This is sometimes called “reverse mentoring.”

Mentoring programs exist in schools, colleges and universities, government agencies, corporations, and non-profit organizations. Some unions have started mentoring initiatives as well. Like other organizations, unions recognize the key role these initiatives can play in developing future leaders.

### THE ORIGINS OF MENTORING

Mentoring has been around as long as civilization. The philosophers mentored their students in ancient Greece, and teachers did the same in ancient Rome. Mentoring is an ancient archetype that comes from Greek mythology: Mentor, a figure in Homer’s *Odyssey*, was a wise advisor to Odysseus’s son, Telemachus, while Odysseus sailed against Troy (Ragins and Kram 2007).

## Why Do Unions Need Mentoring?

Mentoring programs can help unions thrive over time. They enable more seasoned leaders to transfer their knowledge and experience to younger workers and activists. Ultimately, building future leaders helps to keep unions strong.



Photo by AFSCME

Mentoring can especially help women, who constitute almost half the workforce but are underrepresented in the leadership ranks of unions. Mentoring can help by providing women with the support they need to move up through the ranks and reach the top positions.

Having more women visible in leadership positions can increase women's activism in unions.

*“You can be fortunate to be in a time and place to be elected to union office just because of something going on in the union...[but] this doesn't mean you've had the education and training and skills development and leadership development to really handle that position... When there's a thoughtful mentoring program, you not only give people the opportunities to move, you give them support, you give them skills, you give them, ideally, groups they can work with that are going through the same thing.”*

—A labor educator

## Mentoring: Key Points

- Labor unions have a longstanding tradition of informal mentoring.
- Formal mentoring programs are very important as well. They can help diversify the union leadership by increasing the number of women and people of color in leadership positions.
- Mentoring traditionally has involved a relationship between a seasoned leader and a less experienced peer. But it can take place among peers as well. Peer mentoring can create the space for people to feel comfortable talking about their experiences and desired areas of development and growth.
- Mentoring is a two-way process. Older mentors can learn important skills and information from their younger mentees, just as these mentees benefit from the guidance of their more seasoned mentors.



*Photos by David Sachs / SEIU*

## **Different Kinds of Mentoring**

Mentoring can happen in different ways and take different forms. These different forms include informal and formal mentoring, peer mentoring, mentoring circles, and internal and external mentoring.

### **Informal Mentoring**

Informal mentoring happens when people begin a mentoring relationship with little or no assistance from their organization. The parties involved determine the goals of the relationship, strategies for accomplishing these goals, and how the mentoring will proceed. They decide whether to meet in person, how often to touch base, and what they hope to accomplish with the mentoring relationship.

Informal mentoring is fairly common in unions. It can be done with limited time and resources. People may not always even think of informal mentoring as mentoring. “Some people do [mentoring] informally and probably effectively, but they don’t even think of it as mentoring,” one interviewee said. “They just think of it as doing their job. That can be effective, too.”

While informal mentoring can be helpful, it also tends to reinforce existing dynamics of gender and race in unions. Union leaders whom we interviewed said that because mentors generally reach out to others of the same gender and racial/ethnic background, relying on informal mentoring often leaves women and people of color with less access to mentoring.

Unions need to be intentional about encouraging mentoring for those who face discrimination and other barriers to career advancement.

## Formal Mentoring

Formal mentoring is one way to show this intentionality. It is more institutionalized than informal mentoring; the organization helps to set up the mentoring relationship and make decisions such as:

- How often will the mentor and mentee meet?
- How long will the relationship formally last?
- How will the program participants keep track of their successes?

Formal mentoring has traditionally taken place through one-on-one relationships. But it can also happen in a group setting through team mentoring or mentoring circles in which group members support each other's career development.

Formal mentoring programs are less common in unions. But they are important. They can help to make mentoring available to all members and staff, and to diversify the union leadership. Formal mentoring programs can provide unions with a way to identify women and people of color with leadership potential and help them move into leadership roles.

At the same time, formal mentoring programs also have some limitations. For example, if the program gives the mentee little role in choosing the mentor, establishing trust between the two can be difficult. In addition, as one union leader interviewed for this guide pointed out, formal programs have less flexibility: “The more formalized it becomes, the less reactive—and the less proactive—it can be. The more it’s formalized, the less folks get to modify things as they go along.” One solution is to have a mentoring program with general, but flexible, guidelines. Each union or organization needs to figure out its own best approach.



*Photo by AFSCME*



*Photo by David Sachs / SEIU*

## Peer Mentoring

Peer mentoring takes place between those with positions at similar levels within the organization. Some organizations use peer mentoring when there are not enough senior-level mentors. Others use it because they believe peer mentoring can provide a different kind of support than traditional mentoring between an older, more experienced leader and a newer or younger individual. Peer mentoring can offer a different perspective on the issues discussed and a safe space for people to ask questions.

Creating this safe space is important not only for newcomers, but also for more experienced peers. As one labor educator said, “It’s hard when you’ve been the leader of a local for 15 years and are highly respected to publicly say something like, ‘No one ever taught me how to manage people. I don’t know how to be a supervisor and I’ve been doing it for years.’” Peer mentoring can create the space for people to feel comfortable talking about their weaknesses and to discuss strategies for improvement.



*Photos by AFSCME*



### **Mentoring Circle (or Group Mentoring)**

A mentoring circle is a group of individuals involved in mentoring relationships who meet regularly over a period of time. Mentoring circles usually involve one mentor working with a group of mentees or peers mentoring each other. Like individual mentoring relationships, mentoring circles help future leaders set career goals and develop the skills necessary to achieve them. While mentoring circles may not allow mentees as much one-on-one contact with mentors as individual mentoring relationships, they make it possible for mentees to develop a network of contacts and to learn from multiple mentors with different backgrounds and experiences (Abbott 2008).

Mentoring circles may be an effective way for local Coalition of Labor Union Women (CLUW) chapters to bring new leaders along. Because a CLUW chapter includes members from different unions, mentoring circles may provide a space where women can share experiences and learn from people with diverse training, backgrounds and skills. In talking with others outside of their own union, women may gain valuable insights into the obstacles they encounter and strategies for moving forward. The same is true for other constituency groups.



*Photo by AFSCME*

## Internal Mentoring

Internal mentoring happens between two members within the same organization. It has the advantage of providing a mentor who is familiar with the mentee's work setting. Internal mentors may act as their mentee's advocates or advise them on how to respond to specific challenges in their workplace. One disadvantage to internal mentoring, though, is that appropriate mentors can be difficult to find, particularly if the program aims to develop the leadership and skills of women and people of color. In addition, some mentees may not feel comfortable discussing their weaknesses with an internal mentor if that person has input into their performance evaluation or job standing. In such circumstances confidentiality between mentor and mentee is especially important.



Photo by David Sachs / SEIU

*“There are useful things about having dialogs and relationships between individuals of different backgrounds, but the good programs I've seen also allow for group meetings, group reflection, and then you can have a range of people who cross over in these different experiences.”*

*—A labor educator*

“*[As a result of the mentoring] I ended up being very successful . . . the program that I was running ended up being held up as a model. And our international union has really recognized the work that I was doing. And that, I'm sure, would not have happened if I hadn't gotten the help that I needed to be really successful.*”

—A labor educator



Photo by David Sachs / SEIU

### **External Mentoring**

If the organization does not have enough mentors or resources for internal mentoring or if employees would like an outside perspective, external mentoring with a mentor from outside of the organization may be useful. Having a mentor without influence in the organization may, in some situations, make it easier for the mentee to build trust with the mentor. But external mentoring also has the limitation of providing a mentor who does not have authority within the mentee's workplace. One union leader who served as an external mentor said, "To have a mentor outside your union was of limited value. I could talk to my mentee and listen to her and give her ideas about how to think strategically. I could suggest other kinds of training. I could connect her to people, but I couldn't do anything inside her union because I wasn't inside her union. I had no authority, no clout in her union."

## MENTORING AND SPONSORSHIP

Mentoring differs from sponsorship. A mentor is a person with experience who gives you support and advice on how to succeed in your job. Mentors may spend a lot of time with their mentees and come to know them on a personal as well as professional level. A sponsor not only provides professional guidance and advice, but also advocates on your behalf to help you advance within the organization (Toppins 2010). To move up through the ranks of an organization, it is important to have both a mentor and sponsor—a mentor to help you grow and develop the skills necessary to succeed and a sponsor to promote your work to the people in charge.

### What Good Does Mentoring Do?

Mentoring can help the organization, the mentor, and the mentee.

For the organization, mentoring can:

- improve communication within the organization;
- create a collaborative work environment;
- increase job satisfaction and commitment;
- transfer knowledge and history to a new generation of leaders;
- reduce turnover;
- help an organization identify barriers that women and people of color face to advancement, including organizational policies and practices;
- develop new leaders who can serve the organization in a variety of ways; and
- diversify the leadership.

For the mentees, mentoring can:

- facilitate skills development;

- improve job performance;
- enhance knowledge about the union and its history;
- increase job satisfaction as well as their investment in and commitment to the organization;
- identify barriers to success and strategies for overcoming them;
- avoid political pitfalls;
- promote advancement; and
- enable personal growth in a professional context.

While mentoring can have these benefits in many organizations, some union leaders say mentoring may have particular value within unions. “Inside the union, a lot of positions that are appointed positions depend on having your skill set ability recognized, so having someone in leadership who recognizes those abilities is important, and a mentor can be that person,” said one interviewee. Mentoring can help the mentor in many ways as well.

Mentors may:

- gain a sense of satisfaction from helping future leaders;
- learn about different aspects of the organization from their mentees;
- identify the obstacles they have faced;
- reflect on the keys to their own success;
- develop their own communication skills;
- learn to effectively give and receive feedback;
- share their workload with new leaders; and
- increase awareness of issues within the organization, including issues of gender and race.

*“For elected positions, you need to know the lay of the land, the political lay of the land as well as what your constitution or bylaws say about how you go about doing things. I think that’s how a lot of men move. They have relationships with leaders who make it their business to guide them, to give them information, to help them develop skills, to help them think strategically, and to advocate for them. Anyone moving up in union leadership needs that, and men are more likely to have that than women.”*

*—A founding member of a leadership development program*

Mentoring gives the mentor, as well as the mentee, a chance to work in partnership rather than alone. As one union leader pointed out, “Most folks are used to doing things themselves and in their own way, but with mentoring there is collaboration. It forces the mentor to slow down and approach this work in a different way.” The mentor can also develop and grow.

*“I think that another big success [of the mentoring program] was... spreading awareness of our young members throughout the organization. So folks now, in front of each department at the international [union level] as well as just about every local union, are thinking about young workers. How can we help young workers? How can we involve young workers? How can we represent young workers?”*

*—A former union leader*

## MENTORING: PART OF LARGER LEADERSHIP DEVELOPMENT

Mentoring works best when it is part of a broader effort to foster leadership development that includes education and training for mentors and mentees. As one interviewee noted, “You could just mentor someone . . . but unless part of the mentoring is, ‘I need you to go to class and learn this,’ [it’s not as effective].” In her view, mentoring is “individual leadership development that leads to organizational change.”

### **Limits of Mentoring**

While mentoring can help both individuals and organizations, it has limitations. Mentoring does not guarantee that the mentee will receive a promotion; mentees need to take responsibility for their own progress and not rely on their mentors to make sure they advance. Mentoring also does not mean that the mentee should gain access to “inside” information about the organization and the people it employs. The central goal of mentoring is to develop individuals as future leaders, and setting clear boundaries and expectations at the outset will help to ensure this goal remains the focus of the mentoring program or relationship (Williams 2005).

On its own, mentoring also cannot remove the barriers that hinder the advancement of women and people of color. Unions need to have a broader institutional commitment to overcome these barriers. Without such a commitment, the mentoring program may have limited success.

# III. Setting Up a Mentoring Program

Some questions to consider before starting a mentoring program:

- What are the goals and objectives of the program?
- What level of formalization will the program have?
- How long will the program run?
- What time commitment is expected of mentors and mentees?
- What can the union do to free up some time for mentors and mentees so they can integrate mentoring into their work schedules?
- If the program involves group mentoring, where (and how often) will the group meet?

Given the many issues unions address, the different types of work they do, and the varying skills and needs of individual staff and activists, there is no single approach to mentoring that works in all contexts. Each union needs to discern what level of formalization, structure, and goals will be most useful for its members and staff.

## Getting Started

Mentoring in unions often happens because one leader, or a small group of leaders, sees a need to develop future leaders and diversify the union's leadership. One union leader said that the mentoring program she helped to start grew out of a conversation among a handful of women who were union leaders: "We'd all been working in various capacities with the labor movement [in our state], and we looked at its leadership and said 'white' and 'male' . . . there weren't any women [so] we began to talk about the need for more of an ongoing opportunity for women to develop their leadership." Several other leaders said their mentoring programs got started when a key person—such as the union president at the national or local level—decided more needed to be done to bring new or young leaders along.

Another interviewee acknowledged that the push to do mentoring could also come from union members. She said that sometimes the leadership could say, "We need to do this. . . . We need to think about succession. We need to think about moving over and making room. . . . That's different from relying on the woman to say, 'I want this. . . .' Probably, you need some mix of [those things]."

Once union leaders decide they need a mentoring program, how should they get started? Here are some basic steps unions can take to get the process going:

### **1. Select a Program Administrator or Coordinator**

Formal mentoring programs may have a program coordinator who takes care of tasks such as publicizing the program, making matches between mentors and mentees, and designing and distributing relevant forms. Unions can develop a strong mentoring program by choosing a coordinator who is well organized, committed to the program's goals, and knowledgeable about mentoring.

### **2. Recruit Participants**

Recruiting participants for mentoring often happens when more experienced leaders offer to mentor new or younger union staff or members with noticeable potential for leadership.

In formal mentoring programs, participants can take additional steps to recruit future leaders. Mentors or program coordinators can speak up at local meetings, conventions, and conferences about the need for mentoring (American Federation of State, County and Municipal Employees 2011). They can also spread the word about the program with videos or testimonies from past participants.

It is especially important to reach out to women and people of color, who face numerous obstacles to becoming union leaders. Although women may have more opportunities to serve in leadership positions than in the past, they may be reluctant, for various reasons, to take on leadership roles (Caiazza 2007). Encouraging their participation in mentoring programs is critical to diversifying the leadership of unions.

### 3. Identify the Mentees' Needs

Identifying the needs of mentees is essential to providing effective mentoring relationships and programs. At the outset of the mentoring process, it is important to talk about potential areas of growth for the mentee. The mentors can identify skills the mentees need to develop and the mentee can also self-identify his or her needs. The mentees can consider: Where am I now in my comfort level with my job and position in the union, and where would I like to be at the end of the mentoring process?

More formalized mentoring programs often include a survey with questions about the mentee's needs and goals (see Appendix I for a sample mentee survey).

Possible survey questions include:

- What are several strengths in the mentee's performance?
- What are two or three areas for future development?
- What are some possible "stretch" assignments that could help the mentee develop and grow?
- What expectations does the mentee have for the mentoring relationship?

Union leaders with mentoring experience note the importance of having concrete tasks for the mentee. As one leader said, a program can succeed in part because "it's based in real work....not in the philosophical of what I could be doing but...[in] helping people accomplish real tasks."

#### **4. Determine Potential Mentors**

Program administrators should choose mentors who are committed to the mentoring process, are willing to invest time and energy in it, have expertise to share with their mentees, and are committed to breaking down race and gender barriers in their organization.

#### **5. Match Mentors with Mentees**

It is important to find a good fit between a mentee and a mentor. To make a solid match requires taking into account the interests, skills, and goals of mentees as well as the experience and skills of mentors. It may help to collect resumes of mentors or survey them about their background (see Appendix II for a sample mentor survey), and talk with mentees and mentors before making the match to get familiar with their needs.

When a program administrator is involved in matching mentors and mentees, the “matchers” can prioritize organizational as well as individual goals and needs. A limitation to this way of matching, however, is that the mentor and mentee may not feel as invested because they have not chosen the pairing. To increase the sense of investment in the mentoring relationship, some programs give the mentors and mentees a choice in the matching process (Blake-Beard, O’Neill, and McGowan 2007).

Individuals involved in this process will need to think about their criteria and procedures for matching. Do they want to prioritize organizational goals and needs? Do they want to prioritize the goals and needs of mentees and mentors?

How much of a role should the program participants play in making the match? What might be the challenges or opportunities of matches that cross lines of gender, race, and class? Thinking through such questions can help unions make good matches between mentors and mentees.

As Ruth Schimel says, those involved in the mentoring can also consider: What are the risks and benefits of the potential partnership? Do the partners' motivations, goals, and expectations for the relationship seem like a good fit? Do they both have sufficient time and interest? And can they agree on some basic ground rules for the mentoring process (2011)?

What if the match doesn't work? If the mentee has specific goals that the mentor can't help him or her achieve, then the mentor can suggest additional resources or connect the mentee with another person who can help or to a broader support network. As one union leader observed, no one mentor can know everything. Mentees find it valuable to have access to a variety of resources. To this end, mentors may advocate for their mentees (both in and outside of the union) to get training at a labor studies and extension program, if the mentees are located in an area where such training is available.

A greater challenge may occur if the match isn't working because the mentor and mentee have little in common. When this is the case, the pair may discuss the problem and, if necessary, discontinue the relationship (Nemiro 2011). If the mentoring has taken place within a formal program, the program administrators may find a new mentor who can better meet the mentee's needs.

## 6. Provide Orientation for Mentors and Mentees

Offering an orientation session for mentors and mentees can help get a mentoring program off to a good start. The orientation may include a short workshop in which new mentors and mentees have a chance to meet, get to know each other, and discuss their goals and expectations for the mentoring relationship (see Appendix III for a sample workshop agenda). If surveys have been used to facilitate matches between mentors and mentees, these surveys can serve as an icebreaker at the beginning of the workshop. The mentors and mentees can read each other's surveys and use them as a starting point for discussion.

In an orientation session, mentors and mentees:

- learn about the structure and goals of the mentoring program;
- reflect on the skills they bring to the mentoring relationship;
- create a mentoring agreement that includes a work plan and timelines;
- identify specific goals that provide measures for success;
- discuss strategies for accomplishing these goals; and
- complete a mentoring agreement or worksheet for planning the mentoring relationship (see Appendix IV for a sample worksheet).



*Photo by David Sachs / SEIU*

An important part of the orientation is for mentors and mentees to think about their roles and responsibilities.

Mentors are responsible for:

- encouraging their mentees to try new tasks or “stretch” assignments;
- supporting their mentees as they work toward their goals;
- making themselves available;
- giving and receiving feedback in an appropriate and respectful way;
- creating a spirit of openness and trust;
- brainstorming strategies to address obstacles that mentees face in their development;
- sharing information about their own experiences where appropriate;
- serving as an advocate for the mentee when possible; and
- identifying political pitfalls.

Mentees are responsible for:

- thinking through their goals for the mentoring relationship;
- communicating with the mentor about the areas in which they want to develop and grow;
- taking on stretch assignments, such as public speaking, running a meeting, or taking on other leadership roles;
- remaining open to learning from the mentor by responding promptly to his or her e-mails or phone calls, following the suggestions the mentor gives, and listening to the information the mentor shares about his or her own background and experiences;
- following the mentoring plan by keeping scheduled appointments and completing assignments on time; and
- openly evaluating progress and setbacks.

## 7. Offer Training and Education for Mentors and Mentees

Mentoring is only one of several key elements for developing future leaders. It is most effective when combined with training and education for mentors and mentees. One individual involved with a leadership development institute said that its mentoring failed in part because there was no training for mentors and mentees. Without training, it was not “clear what the mentoring relationship was supposed to look like.” It can help mentors and mentees to have basic training—such as an orientation session—that covers what is expected from the mentoring relationship and the roles and responsibilities of both parties.

Union leaders also suggest that mentoring can benefit mentees the most when it happens along with training in basic union skills, such as running meetings, negotiating contracts, or handling grievances.

Some leaders also said it can help if mentees can have continuing education at a labor studies extension program, or to combine mentoring with more in-depth education about financial and political matters and why unions are important. Giving mentees this information can help them to develop the tools they need to do their job and bring others into the labor movement.



*Photos by AFSCME*

## ORIENTATION, OUTREACH AND TRAINING

Include an orientation session for mentors and mentees. This can help get the program off to a strong start.

Promote the program at local meetings, conventions, and conferences.

Combine mentoring with training in basic union skills, such as running meetings, negotiating contracts, or handling grievances. This training can help mentees develop the tools to move up the ranks and bring others into the labor movement.

### 8. Determine the Expected Time Commitment for Mentors and Mentees

Since both mentors and mentees may have limited free time, it is important to clarify the time expectations for the mentoring program. How much time are both mentors and mentees asked to spend? How may unions free up time so that mentors and mentees can meet during the work day? What steps can be taken to convince supervisors to allow the individuals they oversee to participate in the mentoring program? Thinking through such questions can increase participation in the program and help ensure its success.



*Photo by AFSCME*



*Photo by David Sachs / SEIU*

## Challenges of Mentoring

Unions and other organizations often experience challenges when setting up or sustaining mentoring programs or relationships. Some common challenges include limited time and resources, differences among mentors and mentees, and difficulties that come with making transitions in leadership. Some unions address these challenges in creative ways.

### 1. Making Time for Mentoring

Mentoring requires a commitment of time and resources. Some formal mentoring programs last six months or a year, but often the mentoring relationship continues informally after the program has officially ended. As one interviewee said, “Mentoring requires identifying mentors, training mentors, matching mentors with mentees. It requires identifying people to be mentored. And it requires mentoring to happen over time. It’s not a one-shot deal.”

Because unions have limited resources, it is important to keep talking with those in charge about the need for mentoring programs and their positive effects. One individual said, “If you don’t have someone constantly saying, ‘We need this, we need this, we need this,’ it’s easy to let [mentoring] slip by. The resources of the organization [will be] directed differently.”

Unions also address the challenge of limited time by holding mentoring sessions when they are convenient for the participants to attend. One mentoring program, for example, holds group mentoring sessions over lunch during the work day. Others allow for mentors and mentees to speak by phone when an in-person meeting is not possible. With thoughtful and efficient scheduling, even those with limited time may make room for mentoring.

## 2. Generational Differences

Union leaders who were interviewed said that in their experience, activists and staff from different generations are generally very eager to learn from each other. They recognize that their older (or younger) colleagues often have a different perspective that can enrich their own thinking about key issues and priorities.

At the same time, some union leaders say that generational differences emerge in unions, and these differences can pose a challenge in union mentoring. Sometimes younger workers do not feel respected by their older colleagues. In other cases, older workers feel as though they don't know what to say to younger workers.

A woman said that her union worked to increase communication between younger and older workers by giving “stewards specific tools to reach out to workers; we gave the same thing to reps and to union staff.” These tools included information about specific youth events at their union halls, college fairs at their local union halls, or financial planning information. According to this individual, “[older] people were just nervous about talking to young people. Once they were able to overcome that, it really did open up the doors to developing more meaningful relationships and a deeper understanding of the benefit to all parties, the organization as well as the mentors, and definitely the set of leaders who are emerging.”

Increased communication between older and younger workers can lead to common understanding. One interviewee said that older workers “would talk to younger workers, who might have been young, struggling mothers or young folks who were still living with their parents but were doing so because they just couldn’t afford to move out on their own. And this job was really important to them because they were in debt or struggling with health care costs, or they were having the same sorts of experiences that a number of older workers were having.” Giving older workers concrete tools to use in talking with younger workers helped to “break down the stereotypes” so that “folks could understand that the struggles that young workers face are actually really similar to the struggles that older workers face.”



*Photos by David Sachs / SEIU*

## GENDERED MENTORING?

Do women and men have different mentoring styles? Research on this question is inconclusive. One recent study, however, finds that although mentoring may have similar benefits for women and men, male mentors report focusing more on career development than female mentors, while female mentors report providing their mentees with more psychosocial support than male mentors (O'Brien et al. 2010).

### 3. Gender Differences

Women are an increasing proportion of union membership, partly due to growing unionization in jobs commonly held by women, such as nursing and teaching. At the same time, women are poorly represented within union leadership (Milkman 2007). Many women face distinctive challenges in unions that make it difficult for them to become leaders or activists, such as gender discrimination, sexual harassment, and the challenges of balancing work demands with family responsibilities.

Making female mentors available to younger women in unions can help address the barriers that women face in moving into union leadership positions. This does not mean that women should not also have male mentors. But as one female interviewee said, “Even though I had a male mentor, I think it’s really good to have a female mentor because you then see personified in that person somebody who has dealt with what you’re dealing with and who has done it successfully.”

Yet this same woman noted that it makes it more difficult to match women with female mentors if top positions continue to be dominated by men. She said, “If we don’t have women in leadership it’s hard to have women mentors for other women. . . . I think that puts an extra burden on women who do get into leadership to then mentor other women.” Her comments point to the need for unions to take steps that ensure women’s leadership in unions matches their level of involvement.

#### 4. Racial and Ethnic Differences

Several union leaders who were interviewed expressed concern that while the union workforce is becoming more racially and ethnically diverse, top union leadership positions do not reflect this same diversity. Mentoring, in their view, can help diversify the leadership.

A survey of people of color in elected or appointed union leadership positions found that 36 percent of those surveyed felt they did not have someone to “guide them in navigating the political terrain of their organization or in transferring institutional knowledge to them.” More than half perceived “the absence of a supportive environment for people of color to move into elected or appointed positions” (American Federation of Labor and Congress of Industrial Organizations 2005).

Even when they do have mentors, people of color may still have to contend with challenges within the relationship, such as differences in gender, race, or organizational environment (Blake-Beard, Murrell, and Thomas 2007). Just as it is important to provide women with female mentors who can help them address the sexism they face, it is crucial to have mentors of color who are available to work with younger workers of color.

Creating these relationships may require mentoring programs to think about the shape of their leadership and how mentoring relationships are formed. As one interviewee pointed out, mentoring matches often are made between a person who expresses a need for a mentor and another who is willing to serve in that role

She said, “I think that’s one thing, but if we’re talking about inside unions...we have to self-consciously [recognize that] we need more Latinas [in leadership positions]; we need more women of African heritage...” Ensuring that the leadership reflects the membership will help to make mentors of color more available.

Unions also can address the challenges in mentoring posed by racial and ethnic (as well as gender and class) differences by continuing to offer training and education about how issues of race, class, and gender shape the experiences of workers. Despite extensive training programs, internal policies, and programs to address issues of concern to women and people of color, however, the barriers of racism and sexism remain, suggesting that much more needs to be done.

“*Most union activists and leaders wear multiple hats. They’re doing three or four or six things for their local union or national union or state union. To think about taking off a hat or two is how we’ve framed it. This is not about a zero sum game, it’s about too few people doing too much and other people saying, ‘We’re here to help. We’re here to learn from you . . . to preserve a union you’ve built.’*”

—An education director at a national union

## 5. The Difficulties of Transition

While many union leaders strongly support mentoring in unions, others resist it to some degree. One interviewee said that a few leaders just do not support mentoring: “There are some people who say, ‘Hey, I learned this stuff by just jumping in and doing it and getting knocked around, and why shouldn’t everyone else? That’s the right way.’” Another individual suggested that sometimes union leaders find it difficult to “let go” of the roles new leaders are being trained to take on.

Other union leaders who were interviewed said that in some cases, current leaders find mentoring programs threatening. One individual said that some leaders think, “Why do I want to educate, mentor, or train someone who might run against me for office?” Another remarked, “Change is hard, especially in the labor movement, especially whenever you are going into a local and explaining to a local leader that you want to develop other leadership. That can be really scary to local leaders.” And another union leader said, “Within a lot of unions, [leaders] are afraid of losing their own jobs to some young up-and-comer.”

How can unions address these concerns? One woman who was interviewed said it is important to reassure local leaders that developing leadership among their members is not “political suicide” and that mentoring is about building support within unions. She said, “The more you can engage members, the more you can involve members, the more they’re going to know about you and support you and back you up, and the more you can open those lines of communication, the better it’s going to be for everybody.”

## IV. Understanding the Success of Mentoring

The growing body of literature on mentoring in workplaces suggests that mentoring has significant benefits (Mentor Scout 2011; Williams 2005). Those who write about mentoring generally accept that it can lead to positive change, and many individuals who have been mentored say the same.

Not all mentoring “works,” however, and not all mentoring programs survive over the years. Several union leaders interviewed for this project said the mentoring programs they participated in stalled for various reasons. Both the programs that have flourished and those that have not, however, offer important insights into what makes mentoring work.

*“Mentoring is less about telling and more about asking . . . it’s about encouraging the mentee to think through different options.”*

*—An education director at a national union*

## Promising Practices for Successful Union Mentoring

Union leaders involved in mentoring point to some promising practices that can help mentoring in unions succeed over time.

For mentors:

- *Engage the mentee in problem-solving and self-reflection.* One leader said that mentoring is partly about learning “how to approach those teachable moments.” It’s not about telling mentees what they did wrong or should have done. Instead, mentors must learn to ask a question (e.g., “Do you think the outcome would have been better if we had done this differently?”) and collaborate with the mentee in finding a solution. Mentoring also involves helping mentees see their strengths: What do they do well and how might these strengths compensate for their weaknesses?
- *Participate in any training offered for mentors.* Taking part in training sessions on how to mentor can give mentors a clearer sense of their role as a mentor and greater confidence in their ability to mentor effectively. Training for mentors can teach valuable skills such as how to be effective listeners, provide constructive feedback, and understand the mentoring role.
- *Encourage mentees to move beyond their comfort zone.* Taking on challenging or “stretch” assignments lies at the very core of mentoring. By going beyond their comfort zones, mentees develop and strengthen their professional skills. One of the mentor’s responsibilities is to make sure that the mentee has stretch assignments and the support needed to successfully complete them.

- *Keep the conversation focused and stay on task.* Mentoring is most productive when the conversation stays focused on the main task at hand: helping mentees work toward their career goals. To ensure the mentoring sessions are productive, it may help to plan the session structure in advance (see Appendix V for a sample session structure for mentors).
- *Share information about your own history and experiences.* When appropriate, sharing information about your own experiences may help mentees respond to challenges they confront and to identify effective strategies for growth and change. Since mentors may have been in the same career place as their mentees, they can think about what helped them the most at that time and what allowed them to move to the next level.
- *Be open to learning and developing your own skills.* Mentors may find that the mentoring relationship helps them reflect on and improve how they develop their own teams and staff. As they spend time with their mentees, they may become more aware of how they relate to those they supervise and what it takes to support someone else's personal and professional development.

For mentees:

- *Remain open to the mentoring process; do not shut the mentor out.* For the mentee, part of the challenge is to remain open to the mentoring process and willing to hear what the mentor has to say. While the mentor and mentee may have different perspectives, the mentee should keep in mind that the mentor's feedback is worth considering even if at first it may seem difficult to hear.
- *Take time to prepare for each mentoring session.* Before meeting with your mentor, spend a few minutes reflecting on what you have tried since the last session, the outcomes you have noticed, and what you would like to get out of the next session with your mentor. What challenges do you want to address? What questions do you have for the mentor? What would you like the mentor to do? Be sure to write your thoughts down so you can easily keep track and address them efficiently in the meeting (see Appendix VI for a sample preparation form).
- *Try the stretch assignments that the mentor proposes.* Since stretch assignments provide important opportunities to develop your skills and work toward your goals, it is important to remain willing to try out the assignments your mentor suggests.
- *If possible, learn from more than one mentor.* Mentees can benefit from the guidance of more than one mentor. Group mentoring offers one way to learn from the expertise of several mentors or peers who face similar challenges.

- *Have fun with the mentoring relationship.* Mentoring offers a chance to learn from a more seasoned peer and acquire the skills necessary to move forward in your career. Take the mentoring seriously, but don't forget to take time to enjoy all that you try and learn!

For the union:

- *Solicit feedback from mentors and mentees at various stages.* No one knows the strengths and weaknesses of a mentoring program better than its mentors and mentees. It is important to solicit their feedback at various stages in the mentoring process. Program administrators can periodically check in with mentors and mentees to see how things are going. If the mentoring is more informal and no program administrators are involved, the mentors and mentees can set aside time on a regular basis to reflect on their progress. This feedback can help point to changes that need to be made, as well as aspects of the mentoring that have worked well.
- *Make adjustments as needed.* There is no “one size fits all” approach to mentoring. What works in one union may not succeed in another. For this reason, it is important to set up the mentoring in ways that meet the specific needs of the union and to stay open to making changes if needed. For example, if the match between mentor and mentee isn’t working, then the parties involved should evaluate the situation and, if necessary, find a different arrangement. Similarly, if a new issue arises within the union that needs to be addressed or the mentee feels that he or she has not made sufficient progress, the mentor and mentee can reevaluate their goals and strategies.

- *Consider using both external mentors and mentors from within the union.* External mentors can help mentees by providing an “outside” perspective on the mentee’s career trajectory. Some mentees also may find it easier to trust an external mentor who has no input into their job performance evaluation and does not influence their position within the organization. In some cases, having an external mentor allows mentees to speak freely without having to worry about whether things they share in confidence might affect how they are viewed within the union. At the same time, union leaders may believe that external mentors are limited in what they can do for the mentee. External mentors often cannot provide effective guidance on how to deal with issues arising within the union or how to navigate the political “lay of the land.” While having an external mentor can help, it is also important to provide mentees with an internal mentor.
- *Combine mentoring with a broader leadership development effort that includes training and education.* Union leaders emphasize that mentoring is most effective when part of a broader effort to foster leadership development. They stress that while informal, one-on-one mentoring has value, mentoring is most beneficial when part of a larger training and education program that develops specific skills and knowledge essential to union leadership and activist roles.

- *Develop formal mentoring programs when possible.* Labor unions have a long tradition of informal mentoring; but formal mentoring programs are essential to bringing new leaders along, especially women and people of color, who have had less access to informal mentoring. Formal mentoring programs provide a structure and guidelines that allow the mentors and mentees to get the most out of their relationship. As one former mentee said, a formal program can also bring a level of discipline to the mentoring relationship that makes it easier to build trust: “When you’re new at something, I don’t care how old you are, you’re going to be cautious about what you tell somebody, which is one reason that formalizing the relationship would be helpful. . . . It’s easier to trust if there are really clear boundaries. I think trust is the biggest issue.”
- *Use the mentoring program to help identify and shed light on the challenges that women and people of color face in advancing within the union.* Mentoring programs provide an opportunity for union leaders to learn more about the experiences within the union of those they mentor. By spending time with their mentees and encouraging frank discussion within a context of trust, mentors can find out more about the obstacles to career advancement that women and people of color face. Mentors can use this information to promote policies and practices that support the progress of those who face barriers based on contextual factors such as gender or race.

## EVALUATION AND TRACKING

Be sure to evaluate the success of the mentoring program. The evaluation can help identify its most successful elements as well as potential areas for future growth.

Develop concrete ways to keep track of success that are specific to the goals of the mentoring program. For example, a program that aims to increase the political involvement of its union's members might ask: How many of the program participants worked with the union on political campaigns?

### Keeping Track of Your Progress

How can unions track the success of their mentoring programs? Union leaders who were interviewed suggested several different approaches.

1. *Assess how many leaders within the union are mentoring someone and/or being mentored themselves.* Is mentoring happening, and to what extent?
2. *Talk informally with mentors and mentees at the end of the mentoring program or relationship about what worked and what did not.* What have they learned from the process? What good did the mentoring do? In what ways could it have been improved? These conversations can take place between mentor and mentee as well as between program participants and administrators.

3. *Develop formal surveys or interviews in which the mentee and mentor specify what worked and what did not in their mentoring relationships as well as in the program as a whole* (see Appendix VII for a sample mentoring feedback form and Appendix VIII and Appendix IX for sample program evaluation forms).

These surveys may ask questions such as:

- What is your general assessment of the program?
- What worked well during your mentoring relationship? What did not work as well?
- Would you recommend the mentoring program to others? Why or why not?
- What did you learn or otherwise gain from the program?
- What suggestions do you have for improvements to the mentoring program?

4. *Track the progress of past program participants.* Have these individuals become active in their union or become leaders at higher levels? Where have they gone and what are they doing now?

5. *Develop concrete ways to measure success that are specific to the goals of the mentoring program.* Look not only at individual change, but also at organizational change. One mentoring program that aimed to increase political involvement among young workers tracked how many of these workers worked with the union on political campaigns. Program leaders also tracked how many young workers they had organized. They examined how many young people came with an older steward to the stewards' conference and whether more young people were applying for the scholarship program. By developing concrete measures of success that are specific to the goals of its mentoring program, a union can get a clearer sense of the impact that the mentoring has had.

# V. Keeping It Going

## **Getting More Members Interested**

To keep a mentoring program going, the union will need to bring more people into the fold. Union leaders can advertise the program by speaking up at meetings and other events. They can also ask other leaders individually to reach out to potential leaders. One individual who helped start a mentoring program said, “We asked stewards to look for young workers who seemed to know everyone, young people who maybe have a relationship with the union in some way...and then also to people who seem to know other people, to be well-liked, to be leaders in their social circles...[They reached out to] that person and asked them to come along to a union meeting or come along to the next shop steward’s conference... [They made] an active effort to incorporate those young different activists into some of the other organizing work.”

## **Helping Mentees to Become Mentors**

Another way to keep the mentoring going is to help mentees become mentors. Several union leaders who now mentor young workers said they learned how to become mentors, in part, through their own experiences of being mentored. By encouraging mentees to become mentors themselves, unions can expand the base of members involved in mentoring programs and relationships.

## Creating a Mentor Database

Especially for more formal mentoring programs, putting together a database of potential mentors can help ensure that the program thrives over time. The database can describe the mentor's background, interests, experience, and qualifications. Collecting this information and updating it on a regular basis can help program administrators make successful matches and keep track of the mentors available to new mentees.

## Continuing to Build Institutional Support

To help develop institutional support, union leaders can track and publicize the mentoring program's goals and successes. Mentoring program leaders can collect testimonies from past participants and document their accomplishments. One program's leaders created and posted to their website a video of mentors and mentees talking about what they learned from the program. Taking such steps can illustrate the importance of mentoring as a key part of developing future leaders and keeping unions strong.



*Photo by David Sachs / SEIU*

## Helping Women with Families to Be Leaders

Many women in unions need to balance their work priorities with competing family and other responsibilities. This often makes it difficult for women to hold leadership positions in unions, which generally require working long hours.

As unions think about how they mentor and train young women, they can listen to what women have to say about their particular needs and concerns. Doing so can help union leaders to create programs that work for both the women and the organization. These programs may, for example, meet in places that are convenient for the women involved, or offer child care and food at meetings and events that need to happen in the evening or on the weekend. If the mentoring program is for a CLUW chapter, the program leaders also may want to rotate the meeting locations (to make it feasible for women from different regions to attend) and to consider women's travel time when scheduling the mentoring sessions.



*Photo by AFSCME*

# VI. Program Examples

## **1. The National Association of Letter Carriers’ Leadership Academy**

The National Association of Letter Carriers’ (NALC) Leadership Academy mentors local union leaders within a larger leadership development program paid for by the national union. The program is offered twice per year, with about thirty individuals participating each time (approximately two individuals per each of the union’s fifteen regions). The business agent who oversees each region provides input into the selection of participants, who must complete a four-page application form. The leaders at the national level try to ensure diversity in gender, race, and experience level and take into account the needs of the local branches. For example, a candidate from a branch with a large percentage of leaders getting ready to retire or a candidate from a branch that is lacking experienced leadership may receive special consideration.

The academy is a national training program held at the National Labor College in Silver Spring, Maryland. It includes three week-long courses that take place seven to eight weeks apart. To supplement these courses, each participant receives mentoring from a leader in his or her local branch. Now in its sixth year, the academy brings together primarily rank-and-file union members for the training sessions, each of which has a different curriculum and purpose.

To ensure the successful completion of the program and these assignments, the students receive mentoring both during the three week-long training sessions and in the interim periods. The four lead teachers serve as mentors or counselors for the thirty students during the training sessions. Each of the teachers checks in regularly with a group of the students during the week and stays in contact with them after the session. The students also have a local mentor, often the president of their branch, who provides support and guidance. The mentor commits to the role once the member completes the application to the program, including an essay on the mentee's expectations for the program and work to this point.

The NALC does not offer a specific training program for the local mentors, but it does take steps to support them and provide them with information about their roles and responsibilities. The national program leaders provide a mentoring guide for the branch mentors to use. In addition to offering some general information about mentoring, including a definition of the practice and description of its benefits, the guide gives mentors specific tips for how to mentor effectively and help mentees achieve their goals.

The guide also informs the mentors (who do not attend the three week-long training sessions with the mentees) about the program's curriculum and suggests issues to explore with the mentee during the interim periods, such as what leadership means in the context of the NALC, the challenges the union faces, and the specific goals mentees would like to work on in the coming months. In addition, the guide poses concrete questions for mentors to ask their mentees: What does a successful outcome for your learning project look like? How are we thinking about approaching this? What do you need to get done and by when to complete this within the timetable? How can I support you in this work?

## **2. Communications Workers of America**

Since 1983, Communications Workers of America (CWA) has held a Minority Leadership Institute (MLI) designed for activists of color. The Institute consists of two weeks of classroom training at the National Labor College. A one-week internship was added more recently. Interested participants are also offered an opportunity to attend the AFL-CIO Organizing Institute. All lost time and expenses are covered by the International.

The purpose of the MLI is to celebrate and recognize outstanding activists of color and provide support for continued and deeper involvement in CWA.

The institute is an intensive residential education designed to increase the activists' knowledge on core union subject areas, allow opportunities for candid discussion, and provide hands-on experience.

Nominations for the MLI are sent to the President of the Union from the regional offices. Fifteen participants are selected each year to go through the program. Participants are selected with an eye to achieving a diverse class. Each participant is paired with a union staff mentor prior to attending the MLI. The staff mentors are selected based on geographic proximity and interest in mentoring.

The mentors are required to develop an enriching five-day internship program grounded in political, legislative, and/or organizing work. An orientation conference call sets out the responsibilities and expectations for mentors. The internship schedule must be provided to the International Office. Shadowing the staff mentor is not considered an enriching internship. All internships must be completed within six months of finishing the MLI. Mentees are requested to fill out a survey on the internship.

Many MLI graduates have moved up in the union or taken on leadership jobs in other social justice organizations. “The addition of an internship and mentor has allowed us to further leverage the classroom training, providing valuable on the ground experience and a one-on-one connection with an experienced staff mentor,” said CWA Senior Director Yvette Herrera.



*Photo by CWA*



*Photo by NALC*

## Appendix I

### Mentee Survey For distribution prior to program participation

#### General Information

Name:

Phone:

E-mail address:

#### Personal Information

Gender: Female \_\_\_\_\_ Male \_\_\_\_\_

Date of Birth:

Race/Ethnicity:

Languages Spoken (Other than English):

Local Union:

Role in the Union:

What expectations do you have for the mentoring program? What are your goals and objectives?

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Have you already been working toward these goals? If so, how?

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What are two or three of your strengths as a worker or staff member?

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What are your short- and long-term professional goals?

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What do you hope to learn from your mentor? What resources would you like your mentor to provide?

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Additional comments:

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Several questions adapted from *Mentoring Toolkit*, Center for Women & Information Technology, accessed January 28, 2012, [http://www.umbc.edu/cwit/pdf/CWIT\\_Mentoring\\_Tool\\_Kit.pdf](http://www.umbc.edu/cwit/pdf/CWIT_Mentoring_Tool_Kit.pdf).



## Appendix II

### Mentor Survey For distribution prior to program participation

#### General Information

Name:

Phone:

E-mail address:

#### Personal Information

Gender:

Date of Birth:

Race/Ethnicity:

Languages Spoken (Other than English):

Local Union:

Role in the Union:

Briefly describe your current position and responsibilities.

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Describe your prior career path and experiences.

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Have you ever been a mentor? If so, where and for how long?

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What knowledge and skills do you bring to the mentoring relationship?

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What kinds of support and assistance would be most helpful to you as a mentor?

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Additional comments:

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Several questions adapted from *Mentoring Toolkit*, Center for Women & Information Technology, accessed January 25, 2012, [http://www.umbc.edu/cwit/pdf/CWIT\\_Mentoring\\_Tool\\_Kit.pdf](http://www.umbc.edu/cwit/pdf/CWIT_Mentoring_Tool_Kit.pdf), and from the “Getting Acquainted” sample form in Union Plus’ *Mentoring Program Guide for Unions*, accessed January 28, 2012, <http://www.unionplus.org/mentoring-toolkit/administration/index.html>.

## Appendix III

### Sample Agenda for Orientation Session (2 hours)

#### Goals and Objectives of the Orientation Session:

- 1) To understand the basic structure, goals, and procedures of the mentoring program
- 2) To allow mentors and mentees to get to know each other on a professional and personal level
- 3) To create a mentoring agreement that involves a work plan and timeline

#### Agenda:

##### Introductions (10 minutes)

##### Participants state in turn:

- their local union;
- their role in the union; and
- why they are interested in the mentoring program.

##### Overview of the mentoring program (20 minutes)

- How long does the program last?
- What does it involve?
- Why do mentoring? What are its potential benefits? (If possible, have past program participants speak about their experiences and how mentoring has helped them.)
- What are the roles and responsibilities of mentors and mentees?
- What time commitment is required of mentors and mentees?

### Getting acquainted (50 minutes)

Mentors and mentees meet individually to discuss their completed mentor and mentee survey forms. Topics to discuss include:

- current positions and responsibilities;
- career paths and experiences;
- expectations for the mentoring program;
- goals to explore during the mentoring relationship; and
- resources that may be useful in achieving these goals.

### Completing work plan and timeline (30 minutes):

- Mentor and mentee exchange contact information (name, e-mail, phone).
- Schedule next session date, time, and length.
- Determine frequency and length of meetings.
- If meeting by phone, decide who will place the call.
- If meeting in person, determine the location.
- Discuss any other logistical issues.
- Fill out a work plan or set-the-stage template (see Appendix IV).
- Talk about format of mentoring sessions (may want to use Session Structure for Mentor and Session Preparation Guide for Mentee, see Appendix V and Appendix VI).

### Wrap up (10 minutes)

Institute for Women's Policy Research, 2012.

## Appendix IV

### Worksheet for Planning the Mentoring Relationship

When entering into a mentoring partnership both parties commit to a shared effort. This form is designed to document decisions you make together about the work ahead. As conditions change and your relationship matures, refer to this sheet to be reminded of agreements you made early on. Before your first meeting, think about the themes below. When you meet, use the form as the basis for conversation and decision-making.

**1. Clarify roles.** The role of a mentor is to share expertise, advise, advocate, coach, and support. The role of the mentee is to seek advice and take steps toward professional growth. *Write comments or clarifications you wish to make about your roles.*

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**2. Establish purpose.** Mentoring for its own sake is not your purpose! *Record your specific purposes for entering this mentoring partnership (for example, to learn from one another or to develop new skills, such as running meetings or negotiating contracts).*

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**3. Document initial goals.** What do you wish to accomplish by working together in the mentoring relationship? *Record several short-term work goals and long-term goals discussed during the orientation session. You will continue setting goals as you meet in the weeks ahead.*

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**4. Establish mentoring timeframe.** How long should your mentoring relationship last? Having a clear end-point can make you more productive in your time together. Consider a target date six to twelve months ahead. Let major milestones guide your choice, such as a performance review or a product release. Plan a mid-point check halfway to your goal to reflect on progress. *Describe your timeframe here. Set your mid-point check-in meeting now.*

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**5. Plan your work together (regular meetings).** Record when, where, and how frequently you will meet. Agree to maintain momentum by keeping to your meeting schedule, but discuss what you will do if one of you needs to postpone a meeting. *Record your regular meeting plan and contingency plan.*

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**6. Plan your work together (informal interactions).** Mentoring works best when the participants can interact in an “open door” environment, but set some ground rules. Are impromptu drop-in meetings acceptable? What kind of turnaround can each of you expect when the other leaves a message by phone or e-mail? *Briefly note your preferences and expectations.*

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**7. Discuss constructive feedback.** In a healthy partnership, both parties are able to give and take constructive feedback. A mentor may give critical input to help a mentee learn a new skill, change methods, or build awareness. In turn, a mentee may counter a recommendation or ask for a different kind of support from the mentor. *Discuss how you prefer to give and receive critical feedback. And how will you agree to disagree?*

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**8. Determine your next meeting date and time.**

**9. Record contact information for each of you.**

**Name:**

**Phone(s):**

**E-mail:**

Adapted from *Mentoring-in-a-Box: Technical Women at Work*, National Center for Women in Technology, accessed January 11, 2012, <http://www.ncwit.org/resources.res.box.industry.html>.

## Appendix V

### Session Structure for Mentor

Instructions: Mentor, use the following session structure to help guide your session.

1. Update: What has happened since the last time we met? What actions did you take and what new learning did you have? What has become more or less clear?
2. Check in on any agreements from the last session: Did each of you take the action you agreed to? What is the status?
3. Focus for session: What does the mentee want to focus on today?
4. Requests and offers: What requests do you have of each other? What offers does the mentor want to make?
5. Action and agreements: What action do you each agree to take between now and the next session?
6. Logistics for next session: Date and time for next session? Who is calling whom?

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## Appendix VI

### Session Preparation for Mentee

Instructions: Mentee, prior to each session, please prepare for the session by giving advance thought to the following questions. Consider e-mailing an update to your mentor prior to your meeting. This will help focus the mentoring session.

1. What have I tried (new action or practice) since our last session? What impact or insight did I have about it?
  
2. What do I want to get out of the session today?
  - What challenges or concerns do I want to address?
  - What goal area do I want to focus on?
  - What questions do I have for my mentor?
  - What requests do I have for my mentor?
  
3. What action do I hope to take following our session?
  
4. What follow-up do I want/need from my mentor following our session?

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## Appendix VII

### Mentoring Feedback Form

**Instructions: Mentor and mentee,** during your final session together, please take some time to evaluate what worked well and what you would change in the future. Please also assess what is next for your relationship and for the mentee's movement toward the goals you have worked with during the relationship.

**Assess the mentoring relationship and progress toward goals.**

What worked well during the mentoring relationship?

What did I learn/gain?

What did not work as well?



**Feedback for my mentor:**

I felt you were most effective when...

I feel you could be even more effective if...

**Feedback for my mentee:**

Here's what I saw in terms of your growth and movement toward your goals...

Here are my hopes/wishes for you as you go forward ...

## **What's next:**

Spend some time discussing what each of you would like to see in the next phase of your partnership.

Possibilities include:

1. Continue in formal partnership
2. Transition to informal/situational meeting
3. Celebrate and complete your relationship
4. Other

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## Appendix VIII

### Mentees' Program Evaluation Form

Your confidential feedback will be used to help improve the mentoring program for future participants.

1. How helpful did you find the mentoring program?

1  2  3  4  5

*(1=extremely helpful and 5=not helpful at all)*

2. Which aspects of the program did you find most useful? Which aspects did you find least useful?

3. Would you recommend the mentoring program to others?

No  Maybe  Yes

4. Do you feel that the program has:

Helped you learn new skills?

Connected you to important professional networks?

Helped you feel more confident in your professional roles?

Increased your interest in taking on new leadership positions?

Improved your job performance overall?

5. What suggestions do you have for improving the program?

Institute for Women's Policy Research, 2012.

## Appendix IX

### Mentors' Program Evaluation Form

Your confidential feedback will be used to help improve the mentoring program for future participants.

1. How helpful do you think the mentoring program is for developing future union leaders?

1  2  3  4  5

*(1=extremely helpful and 5=not helpful at all)*

2. What forms of support did the program provide that were especially useful to you as a mentor? Are there additional supports for mentors that you believe should be offered?

3. Would you recommend the mentoring program to others?

No  Maybe  Yes

4. Do you feel that the program has:

Helped to create a more collaborative work environment?

Developed new leaders who can serve the union in various ways?

Helped to diversify the leadership?

Facilitated your own personal growth as a mentor or supervisor?

5. Would you be interested in serving as a mentor again?

No  Maybe  Yes

6. What suggestions do you have for improving the program?

Institute for Women's Policy Research, 2012.

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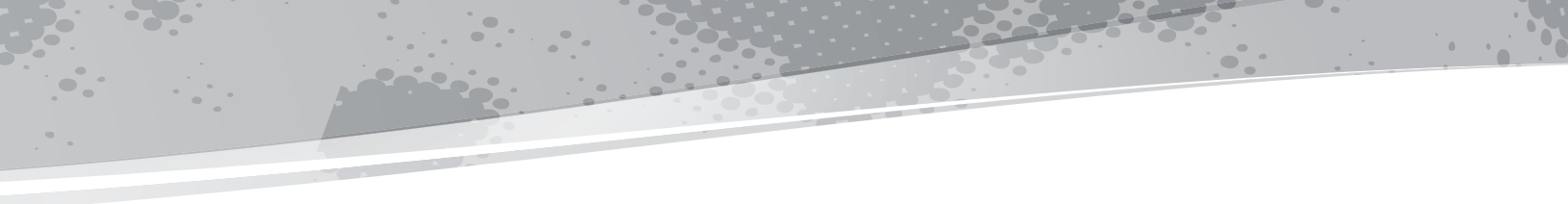
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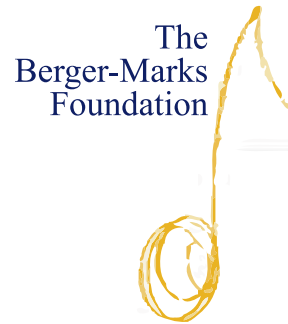
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