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The Mentor's Guide Facilitating Effective Learning Relationships

Book Report by Frumi Rachel Barr, MBA, PhD

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Foreword by: Laurent A. Daloz

Author bio and credits: Lois Zachary is a specialist in Adult Development and Learning. She is a principal at Leadership Development Services located in Phoenix, AZ, which offers leadership coaching, education, and training for corporate and not-for-profit organizations across the continent. She is also a program associate of Leadership Center West, based in San Jose, CA, which focuses on achieving organizational effectiveness by improving the quality of people's lives at work.

Zachary coaches leaders and their organizations in designing, implementing, and evaluating learner-centered mentoring programs. She is a 1998 recipient of the Athena Award in Recognition of Excellence in Mentoring for her research in mentoring.

Noteworthy information regarding contents and chapter titles:

This book is chocked full of summary tables and thought provoking worksheets (exercises) that can be used by a coach. It can serve as a coaching "how to" reference book to be consulted when you have questions, stumbling blocks etc. Or, it can be read beginning to end as another coaching tool that focuses on learning as the frame through which to conduct coaching/mentoring.

The chapter titles follow a metaphor that communicates Zachary's approach to the mentoring partnership. The metaphor is one of process required to grow and harvest a bounty. The chapters follow a logical progression that will sound familiar to a seasoned gardener or farmer. They are:

1. Grounding the work: focusing on learning
2. Working the ground: considering context
3. To everything there is a season: predictable phases (there are four)
4. Tilling the soil: Preparing
5. Planting seeds: Negotiating

6. Nurturing growth: Enabling
7. Reaping the harvest: Coming to closure
8. Regenerating personal growth through mentoring

Zachary's guide includes a detailed appendix for mentoring a culture and provides resources for further learning.

Author's main point (what will you remember about this book?)

The author distinguishes between coaching and mentoring by writing—“coaching is always a part of mentoring, but coaching does not always involve mentoring. Coaching within the context of a mentoring relationship has to do with the skill of helping an individual fill a particular knowledge gap by learning how to do things more effectively.” Therefore, the mentor and Mentee partnership is the context for her book. She appears to use the term mentor as the more “traditional” corporate role where an executive or senior person is assigned a “high potential” to assist in his or her development. Although her context is primarily a corporate setting in a traditional mentoring relationship—the book's content is very transferable to the HI coaching approach.

Zachary makes three major points in her guidebook:

1. The most effective mentoring occurs when it is learner-centered, which is grounded in knowledge about adult learning. The learner (Mentee) plays a more active role in the learning than in more traditional mentor-driven approaches. The mentor's role has been replaced from the “sage on the stage” to the “guide on the side.” Zachary believes that learning is the fundamental process and primary purpose of mentoring. As a result, many of her exercises require self-reflection on the part of the Mentee, and on the mentor.
2. Zachary devotes a significant portion of the book to the self-learning that she believes is essential to the mentoring process. As she states “without a mentor's commitment to personal learning, the potential effectiveness of the learning relationship is greatly reduced.” I found this point to be particularly helpful in thinking about my experiences as a coach—especially in reflecting on my own learning and development as a coach.
3. She has developed a four-phase process to describe the mentoring process: Preparing, Negotiating, Enabling, and Closure. There is an overview chapter and a chapter dedicated to each of these four phases with lots of summary tables and exercises. I found these to be a good supplement to other tools found in books like Whitworth's Co-Active Coaching. These four phases are parallel in many ways to Egan's coaching steps. She also gets into specialty areas around feedback, overcoming obstacles, long-distance mentoring, and cross-cultural mentoring.

A few supporting ideas (ideas which support the main point):

- Strategies for facilitating learning—Zachary offers suggestions to help the Mentee's learning process with a specific section on “what you can do” for each of these suggestions.
 - Asking questions
 - Reformulating statements

- Summarizing
 - Listening for the silence
 - Listening reflectively
 - Using reflection
- Context—is always at play, in subtle and overt ways. It helps us understand the values that drive our behavior, affects our emotions, and colors how we read a person or situation. Ignoring context, overlooking it, or taking it for granted dramatically affects the learning that takes place in a mentoring relationship. “Adult learning is best understood when the context is considered with the same attention as the teaching and learning interactions occurring within it.”
 - Phase 1: Preparing—because of the unique nature of each mentoring relationship, both mentor and Mentee must prepare individually and in partnership. Mentors explore personal motivation and their readiness to be a mentor. They assess their mentoring skills to identify areas for their own learning and development. Clarity about both expectation and role is essential for establishing a productive mentoring relationship. Preparing is also a discovery process.
 - Phase 2: Negotiating—Zachary compares this phase to “planting seeds.” Negotiating is described as the “business phase” of the mentoring relationship—the time where mentoring partners come to agreement on learning goals and define the content and process of the relationship. It is not as simple as drawing up an agreement. A key part is the conversation that leads up to it, when the ground rules for moving the relationship forward are developed. The negotiating phase has more to do with creating a shared understanding about assumptions, expectations, goals, and needs than actually putting a formal agreement in writing. It also involves talking about some of the “soft” issues in a relationship—topics like confidentiality, boundaries, and limits, which often are left out of mentoring conversations because the partners find these issues difficult to talk about. Finally, negotiating includes the “details”—when and how to meet, responsibilities, criteria for success, accountability, and bringing the relationship to closure are mutually articulated during this phase.
 - Phase 3: Enabling—the phase that takes the longest to complete because it is the implementation phase of the learning relationship. It is a complex phase because although it offers the greatest opportunity for nurturing learning and development, the mentoring partners are also most vulnerable to myriad obstacles that can contribute to a derailment of the relationship. Even when goals are clearly articulated, the process well defined, and the milestones identified, every relationship must find its own path. The enabling phase is a process of path building: maintaining a sufficient level of trust to develop the quality of the mentoring relationship and promote learning. Effective communication is key. The mentor’s role during this phase is to nurture the Mentee’s

growth by establishing and maintaining an open and affirming learning climate and providing thoughtful, timely, candid, and constructive feedback.

- Phase 4: Coming to Closure—is an evolutionary process that has a beginning (establishing closure protocols when setting up a mentoring agreement), a middle (anticipating and addressing obstacles along the way), and an end (ensuring that there has been positive learning, no matter what the circumstances). Zachary believes all three components are necessary for satisfactory closure. She provides a lot of help in this area within her book. She also states that closure involves evaluating, acknowledging, and celebrating achievement of learning outcomes. It is beneficial for the Mentee, and for the mentor.
- The paradigm used throughout the guidebook is adult learning. Research indicates that one of the ways adults learn best and also retain the knowledge they learn is by consciously reflecting on their learning. Reflection is an introspective dialogue carried on in written form that stimulates the raising of questions, provokes the assessment of learning, and enables the integration of new learning. In addition, reflection during the mentoring process “enables us to slow down, rest, and observe our journey and the process of self-knowledge that is so important along the way.” Zachary insists on regular self-reflection by the mentor and provides many exercises to facilitate the process.
- Zachary does a nice job of providing summary tables and exercises to facilitate the process she espouses. A sample of the exercises include:
 - Assessing readiness for this mentoring relationship
 - Questions for self-reflection on cross-cultural mentoring relationships
 - Stretch goal action plan
 - Mentoring negotiating questions and outcomes
 - Mentor’s worksheet for evaluating Mentee goals
 - Generating a list of learning opportunities
 - Enabling questions: a readiness checklist
 - Signals that it might be time for closure

Anything of interest in the index?

The appendix and references section are useful. Appendix A focuses on creating a mentoring culture which can be of value to a person working within and organization who is charged with developing, administering, or engaging in mentoring programs for the organization. Appendix B is an in-depth section on additional resources organized by the topics of each of the book’s chapters, e.g., resources for focusing on learning, considering context, the four phases, etc.

Anything of interest in the chapter notes?

There are no chapter notes per se. However, the summary tables do a nice job of concisely capturing key points within a chapter.

Reviewer's recommendation:

The guidebook can be a helpful addition to the coaches library of “how to” coaching books. The summary tables and exercises are thought provoking; although it is unlikely I would adopt them in their entirety. The book is geared toward an organizational mentoring program, but can still be very useful in either transformational or performance coaching.



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About the reviewer: Frumi Rachel Barr, MBA, PhD

Many CEO's find themselves asking “What now?” to sensitive situations that only an experienced former CEO can understand. Frumi is the advisor to call to work with you and your executive team as a confidante and - some would say - corporate shrink. She has an uncanny knack of getting to the heart of your corporate climate and maximizing your team’s performance, profitability and sustainability.