Mentoring:

An Age Old Strategy for a Rapidly Expanding Field

A What, Why and How Primer for the Alcohol and Other Drugs Field

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National Centre for Education and Training on Addiction

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Foreword

The National Centre for Education and Training on Addiction (NCETA) was established in the early 1990's with a brief to enhance the educational and training opportunities available to workers in the Alcohol and Other Drugs (AOD) field. More recently, this role has shifted to a workforce development perspective which focuses on the broader range of factors impacting on the field.

NCETA's Mission Statement now is:

> *To advance the capacity of human services organisations and workers to respond to alcohol and drug related problems.*

This monograph on mentoring is an important contribution to the work and vision of NCETA. It is seen as an initial, but significant, step in advancing workforce development efforts in the AOD field. Difficulty is sometimes encountered in terms of understanding what workforce development is about. A common misperception is that it is really just training under a different name. It is important therefore to help the field start to conceptualise the broader aspects of workforce development and to see ways in which they might be able to operationalise practical, meaning and useful workforce development strategies.

This monograph does exactly that! Joanne McDonald has written a practical, user-friendly document that maps out ways in which mentoring may be adapted and adopted by AOD organisations and workers. She also flags possible future directions for further developments in the application of mentoring within the AOD field. As such, this document is seen as an initial step forward in advancing a strategy that can be both cost effective and beneficial to the field. The reader is invited to explore the possibilities that mentoring might offer them personally or organisationally and they are urged to think creatively about ways in which this, and other, workforce development strategies might be utilised.

AM Roche
Director
NCETA

Introduction

Mentoring is a well-known strategy in the business world for producing leaders and supporting the career advancement and personal development of employees. It is also widely used to enhance opportunities for young people and overcome difficulties encountered by at risk youth. In recent years there have been

Mentoring as a strategy for Workforce Development

increasing calls for mentoring in the Alcohol and Other Drugs (AOD) field. To date, however, it appears that little has been published that specifically addresses mentoring in relation to AOD work, despite mentoring, both formal and informal, being common in the field. There is, however, a considerable amount of mentoring literature produced by disciplines that have significant potential to respond to AOD issues, including medicine, nursing, social work and education. This suggests a familiarity with the idea of mentoring and readiness to view it as a strategy for the AOD field.

Purpose

This work represents a primer on mentoring for the AOD field. It is a synthesis of the mentoring literature from other disciplines, discussed in the context of AOD work. Mentoring is highlighted as a potential workforce development strategy to support professional development and adoption of best practice and to reduce isolation, stress and burnout. There is no attempt made to provide an exhaustive overview of mentoring currently occurring in the field, as this is beyond the scope of this monograph and will be the subject of further research.

It is hoped that workers in the AOD field, including policy makers, funders, managers, researchers and frontline workers will read this volume. The field includes those working in medical and allied health, education and law enforcement, both drug-specialists and non-drug-specialists (NCETA, 1998). Box 1 indicates those within these broad groups. In addition to stimulating further research into mentoring for AOD workers, it is anticipated that this volume will encourage development of mentoring programs and facilitation of mentoring relationships.

The three main sections of the monograph, summarised in the remainder of this section, reflect the questions in the subtitle: What? Why? and How?

Box 1: Target Audience: Workers With the Potential To Address Drug and Alcohol Issues

Medical or allied health

- doctors (GP, accident and emergency, medical officer, psychiatrist)
- nurses (registered, mental health, community/outreach)
- pharmacists
- occupational therapists
- ambulance officers
- paramedics
- psychologists
- social workers
- youth workers
- welfare and community workers
- culturally and linguistically diverse workers
- Aboriginal and Torres Strait Islander health workers
- alcohol and drug specialists

Education

- school teachers
- school counsellors

Law enforcement

- police
- prison and community officers
- parole officers
- magistrates/judges

Non frontline professionals

- other therapists
- dietitians, acupuncturists
- naturopaths

Miscellaneous

- hospitality
- clergy
- managers, supervisors
- crowd controllers
- private security workers

(NCETA, 1998)

What is Mentoring?

This section provides an overview of mentoring - defining mentoring and outlining several mentoring models, the functions and roles of mentors and the typical lifecycle of a mentoring relationship. While mentoring shares similar learning objectives as education and training, it differs significantly in the degree of collaboration and partnership between mentor and protégé. The definition of mentoring acknowledges the traditional notion of mentoring as a one-to-one, intense personal relationship, but emphasises the importance of broadening this notion to include mentoring relationships which are structured, less intense and short term. It is this broader concept of mentoring which has the greatest potential as a workforce development strategy for the AOD field.

A number of models are presented which expand on this broader understanding of mentoring. The first explores the continuum between informal, spontaneous mentoring and formal or structured mentoring programs. Other less traditional models include those between peers, within groups and self-managed by the protégé. The role of managers, as both a mentor and an important stakeholder in the mentoring relationships of their staff, is discussed.

The function of the mentor is to provide both career-related and psychosocial support. The former is particularly important in addressing the recruitment and retention issues that face the AOD field. As a motivational strategy, career-related support can help generalist human service workers fulfil their potential in responding to AOD issues. The psychosocial functions of mentoring help absorb stress and prevent burnout associated with difficult working environments. These functions are fulfilled through the variety of roles adopted by the mentor, including teacher, role model, advocate and guide.

Typically, mentoring relationships proceed through a cycle of four stages - initiation, maintenance, termination and transformation.

Why Adopt a Mentoring Strategy?

Mentoring is an important strategy for the AOD field. The objectives of mentoring as a workforce development strategy can simultaneously benefit mentors, protégés and organisations.

The chief aim of mentoring as a workforce development strategy is to maintain and improve the overall response to AOD issues. Another is to address difficulties in recruitment and retention in the AOD field by offering mentoring as an incentive and support strategy. Mentoring may facilitate collaboration between workers, organisations and disciplines. It can also be used to manage the dynamic nature of the AOD field, that is societal fluctuations and innovations in responding to these changes.

How is Mentoring Done?

The largest section of the monograph details key factors involved in mentoring and guidelines for implementation. Key factors for maximising the potential of mentoring relate to characteristics of the work environment, mentoring programs, the mentor and protégé and their relationship.

Guidelines are provided for those implementing a mentoring strategy, including advice regarding assessment, preparation, implementation and evaluation of formal mentoring programs, together with strategies to encourage development of spontaneous mentoring

relationships. This is followed by guidelines for mentors, such as deciding whether to become involved in mentoring, advice for the initiation and duration of the relationship, avoiding pitfalls and knowing when and how to move beyond the relationship. Advice for protégés forms the final part of this section, and includes how to attract and approach a mentor, negotiate an agreement and make the most of mentoring.

Future Directions

This monograph is based on mentoring literature from other disciplines and the workforce development literature relevant to the AOD field. It is part of a larger project and is intended as a point of departure for mentoring research addressing the AOD field. It is anticipated that the next phases of the mentoring project will include the following:

- assessing the extent and quality of mentoring, both formal and informal, currently occurring amongst workers who respond to AOD issues
- implementation of a pilot mentoring program
- development of a mentoring website, containing information about mentoring for the AOD field, a mentor's forum and listserve.

What?

What is Mentoring?

Defining Mentoring

The concept of mentoring enjoys widespread popularity, being applied in various contexts and fields (Linney, 1999). It is generally agreed that mentoring differs from traditional learning methods such as education and training.

Mentoring is a developmental relationship and, like education and training, the primary objective is learning (Linney, 1999). A major difference, however, is that mentoring involves a greater degree of partnership (Ritchie, 1999). The mentor and protégé work together to set goals, driven by the needs of the protégé, rather than the mentor acting as an instructor who sets the curriculum and learning objectives.

In meeting their goals, the protégé draws on the experience of the mentor, but instead of acting as the expert and simply providing answers, the mentor encourages the protégé to uncover solutions themselves (Linney, 1999). This is an important facet of mentoring – the protégé develops the potential for "deep learning", that is, learning that emphasises the pursuit of meaning and understanding (Knapper, 2001), enabling the protégé to eventually become independent of the mentor. The process of learning is flexible and dynamic, allowing adjustment of objectives and milestones and time, frequency and location of meeting.

While there is widespread agreement about these characteristics of mentoring, it is important to recognise that such relationships can also differ in a number of ways. Because mentoring is used in various contexts, the needs, interests and objectives of those involved frequently differ (Caravalho and Maus, 1996). Some authors contend that mentoring is a narrow, clearly defined relationship (Bernard, 1996; Linney,

Characteristics of Mentoring

- the more experienced help less experienced
- relationship is developmental
- objective is learning
- partnership approach
- address "how" as well as "what"
- flexible/dynamic

Definitions of mentoring differ in terms of:

- aims and objectives
- context
- duration and intensity of relationship
- personal or occupational sphere
- role and function of mentor
- formation of the relationship, ie degree of spontaneity or structure
- one-to-one or group
- experience/age differential between mentor and protégé

1999), whereas others see it as broad and encompassing many different activities (Ritchie, 1999).

The traditional definition of mentoring is of a one-to-one, informal, spontaneous relationship (Bernard, 1996; Linney, 1999), often only recognised as a mentoring relationship in hindsight (Linney, 1999). The mentor is usually older than the protégé, thus having greater life experience to offer the protégé (Bernard, 1996). This kind of relationship is intense (May et al, 1982 cited by Andrews and Wallis, 1999), often lifelong (Welsh National Board for Nursing, Midwifery and Health Visiting, 1992 cited by Andrews and Wallis, 1999), and covering both occupational and personal issues (Ricer, Fox and Miller, 1995 cited by Ricer, 1998; Dram, 1985 cited by Scandura, 1998). In some instances, the purpose of such a relationship is to benefit the protégé (Caravalho and Maus, 1996). In others, such as the master-apprenticeship model (see Box 2: History of Mentoring, at the end of this section), it may be to carry on the legacy of the mentor, or to pass on a skill or craft to the next generation (Murray, 1991).

Broadening the Definition

In reality, there are few mentoring relationships that fit perfectly into the traditional mentoring mould. However, the benefits of a mentoring relationship have been recognised by many, and so the definition has been broadened in an attempt to capture some of the apparent magic (Chao, Walz, and Gardner, 1992; Veale and Wachtel, 1995 cited by Scandura, 1998). It is the wider understanding of mentoring that is useful to the AOD field because of its potential application as a strategic tool for workforce development.

In response to the apparent success of informal mentoring relationships, it was believed that the element of chance in becoming involved in a mentoring relationship could be eliminated. Many organisations or other bodies have structured the mentoring relationship by establishing formalised mentoring programs, matching the mentor and protégé and actively supporting the development of the relationship (Chao et al., 1992; Veale and Wachtel, 1995 cited by Scandura, 1998). It has been argued that formalising the relationship reduces its efficacy, as the chemistry or magic of the spontaneous relationship is lost (Caravalho and Maus, 1996). Others claim careful management of the mentoring program can reproduce this effect.

A number of formalised mentoring-like relationships already exist for workers who have the potential to respond to alcohol and drug related issues. Nurses and social workers have the preceptor relationship (Andrews and Wallis, 1999; Darling, 1984; Ritchie and Connollly, 1993). Medical doctors have an internship (Linney, 1999). Teachers are often mentored when they first begin teaching, being referred to as novices instead of protégés (McNally and Martin, 1998; Ritchie and Connollly, 1993). Most postgraduate students in the health professions, such as psychologists, have a thesis

supervisor during their honours, masters and/or PhD years. University tutorials have the potential to become a group mentoring experience. Generally, these relationships exist for a finite period, and are predominantly concerned with enhancing clinical or other work related competencies through advice, teaching and assessment (Andrews and Wallis, 1999; Ricer, 1998).

In transferring the mentoring relationship to the occupational sphere, other changes occur. The relationship may be less intense and personal (Andrews and Wallis, 1999; Ricer, 1998; Scandura, 1998), sometimes focussing solely on the career of the protégé, rather than on their personal development. When an organisation or other body has established a mentoring program to advance the careers of its employees, often the underlying objective is ultimately to benefit the organisation. For example, mentoring employees can increase the number of experienced staff or reduce staff turnover (Caravalho and Maus, 1996).

In situations where the mentoring relationship is established to achieve a specific outcome, the relationship may be relatively short term, perhaps six months to a year (Linney, 1999). Broader definitions also recognise one-off or infrequent occasions where a worker draws on the experience of another as mentoring (Darling and Schatz, 1991).

As well as challenging the lifelong nature of the relationship, the requirement for the mentor to be older becomes less relevant in the occupational context. It is experience that counts (Winefield, 1998). In addition, the mentor is not necessarily more experienced in general than the protégé, but perhaps has a particular area of expertise which they share with the protégé. In the AOD field, the age differential is even less significant because it is experience in relation to drug and alcohol issues that is important, not the years spent in the workforce. This idea is taken a step further in a mentoring relationship where each participant adopts both the mentor and protégé roles in the process of exchanging experience and knowledge. This is referred to as peer, mutual or co-mentoring.

A definition of mentoring needs to encompass both similarities and differences in its myriad conceptualisations. Such a definition is given below:

> *Mentoring is essentially a collaboration, whereby the mentor works with the protégé to enhance learning and address issues and challenges. Mentoring relationships differ in a number of key ways, relating to the formation and aim of the relationship, the context in which it occurs and the degree of difference in experience between mentor and protégé.*

Mentoring Models

This section expands on the broad definition of mentoring described in the previous section, and outlines a number of mentoring models that can be usefully applied to the AOD field.

Formal or Informal Mentoring

A fundamental consideration is the formal-informal dichotomy. The key difference between formal and informal mentoring lies in the formation of the relationship (Chao, Walz, and Gardner, 1992). Informal mentoring relationships are those that arise spontaneously. This relationship possesses many characteristics of close personal relationships - it is based on good rapport and mutual attraction and tends to develop slowly without a formal commitment by either party, resulting in strong ties and a high degree of intimacy (Caravalho and Maus, 1996). In contrast, formal mentoring relationships are initiated and managed by an external party (Clark, 1995). For this reason, formal mentoring is often referred to as facilitated or structured.

The magic of informal mentoring is a "mysterious chemical attraction between two people … prompt[ing] them to take the risk inherent in any intensely close relationship"
(Fury, 1980:47 cited by Murray, 1991)

Despite the apparent polarisation of formal and informal mentoring, it is useful to envisage a continuum (Ritchie, 1999). At one pole, the degree of facilitation or formalisation may be implementing systems and structures that encourage spontaneous formation of mentoring relationships, with no further intervention. At the other is the fully structured mentoring program, concerned with overseeing the entire relationship, from recruitment and matching of participants, through coordinating and supporting the relationship, to evaluation of its success or otherwise (Murray, 1991). In considering mentoring as a workforce development strategy, it is important to address the entire continuum.

Implementation of policies and conditions that encourage informal mentoring relationships is vital. Firstly, there is evidence to suggest that informal mentoring relationships are more effective than facilitated relationships (Chao, Walz and Gardner, 1993 cited by Scandura, 1998). The formation of informal relationships results in a kind of magic, because the relationship arises out of a natural rapport and common interests between the mentor and protégé (Fury, 1980 cited by Murray, 1991). Thus, motivation is greater (Chao et al., 1992). The mentor is more likely to devote attention

and give support to the protégé and the protégé is generally more willing to accept the mentor's advice and assistance (Winefield, 1998).

Further, the range of workers that have the potential to respond to AOD issues is vast (NCETA, 1998). It is neither feasible nor possible to establish formal mentoring programs for all of these workers. Out of necessity, a top down approach is required to address policies and procedures that both encourage and inhibit mentoring.

It is important, however, not to overlook the potential contribution of formal mentoring programs. Careful management and evaluation of formal programs can simulate the effects of informal mentoring. Mentoring can improve induction and socialisation of new workers, improve performance, provide support and complement other professional development activities (Gibb, 1999), even if the inexplicable magic of mentoring remains somewhat elusive. In addition, formal programs have a number of advantages. Formal mentoring programs may increase accessibility for those who lack the social skills or opportunity to develop such relationships, whereas the top-down approach to encourage informal mentoring may discriminate against these individuals (Coombe, 1995).

Formal programs also provide more support for both participants (Murray, 1991). There is usually a coordinator who helps solve problems and protects the benefits of mentoring. Training and orientation prepare the mentor and protégé so they understand the nature of mentoring, develop relevant skills and are aware of potential pitfalls. Formal programs also provide a safety buffer by detecting and terminating relationships that have become detrimental to one or both participants (Murray, 1991).

Specific applications of mentoring programs include offering participation in a mentoring program as an incentive to attract skilled and qualified workers to the AOD field and to retain existing workers. Another is to establish programs to link different professions and institutions within the field, and provide support and accessible professional development for those working in rural and remote areas.

A formal program may be aimed at managing change such as expansion of the field's knowledge base, by pairing frontline workers with mentors skilled at filtering and synthesising innovations in treatment and intervention. Formal mentoring programs are also an effective means of providing support during periods of sweeping change. A particularly useful application of facilitated mentoring is to establish relationships between recognised experts in the field and those who have significant power to affect change, such as policy makers and the media.

Peer and Cross-Disciplinary Mentoring

The peer mentoring paradigm is particularly relevant to the AOD field. This is a mentoring relationship between two people of equal standing who engage in reciprocal mentoring activities – each adopting the roles of protégé and mentor (McDougal and Beattie, 1997 cited by McBain, 1998). They share experience and knowledge, learn from the other's, often different, perspective and provide support to each other. Alternative labels for this type of relationship are collegial or mutual mentoring. It is particularly useful for the AOD field with its flat career paths and where a wide perspective is beneficial (Butcher and Prest, 1999).

Peer mentoring is "... a process where there is mutual involvement in encouraging and enhancing learning and development between two peers, where peers are people ... who perceive themselves as equals"
(McDougal and Beattie, 1997 cited by McBain, 1998)

The peer mentoring model reflects increasing awareness that workers learn effectively from each other and that learning is an integral part of work (Chalmers, Murray, and Tolbert, 1996). Instead of merely contributing to accreditation and professional membership requirements, peer mentoring encourages development of expertise in the AOD context.

It is well suited to the diversity and breadth of the AOD field and makes good use of the vast range of expertise in the field. Peer mentoring provides an opportunity for knowledge sharing and support (McBain, 1998) between different professions and vocations, between generalists and specialists and those with various degrees of AOD experience or academic qualifications. It can improve collaboration within and between organisations. In particular, cross-disciplinary peer mentoring relationships can enhance collaboration within and between organisations, helping to reduce the "silo effect" which results in isolation between knowledge domains and different administrative and functional services (Gore, 2001; Roche, 2001). For workers in rural and remote areas, peer mentoring could be a source of substantial support (Little, Brown and Sullivan, 2001).

Significant advances in technology and the increasing call for evidence-based practice (Roche, 2001) have created another niche for peer mentoring. It has the potential to play a significant role in the dissemination of research and treatment innovations and their integration with clinical expertise by pairing seasoned practitioners with those at the cutting edge of technology, such as those experienced in the use of systematic reviews. For example, an AOD veteran can update their ability to collect and interpret information on current best practice. In return, the evidence-based practice advocate can benefit from the practitioner's clinical or field experience.

Group Mentoring

As the name suggests, group mentoring deviates from the traditional notion of mentoring as a one-to-one relationship. Group mentoring offers the opportunity for a number of people to benefit from the attention of a single mentor. However, group mentoring has an added synergistic effect through the interaction of the group members (Kaye and Jacobson, 1995). The mentor is more accurately described as a group faciliator or learning leader, acting as a partner in the learning process, helping the group members to mentor each other by sharing ideas, skills, experience, guidance and feedback (Kaye and Jacobson, 1995). Thus, group mentoring magnifies the power of peer mentoring by providing opportunities to interact with a broader base of experience (Kaye and Jacobson, 1995; Ritchie, 1999).

Group mentoring is "a group influence that emerges from the social norms and roles that are characteristic of a specific group and results in the career enhancement of an individual member"
(Dansky, 1996 cited by McBain, 1998)

Participation in a mentoring group develops cooperation and collaboration between people with similar objectives but potentially diverse backgrounds, such as a multi-disciplinary treatment team. Group mentoring can benefit those sharing a workplace, drawing on the potential of informal meetings and gatherings and transforming them into opportunities for context-specific learning and support.

Self-Managed Mentoring

Self-managed mentoring, a model described by Darling and Schatz (1991), is perhaps one of the furthest deviations from the traditional mentoring concept. In this model, a person is responsible and proactive about his or her own professional development by seeking mentoring-type relationships as the need arises. It is a dynamic and ongoing process. A person has a number of mentors simultaneously, each collaborating with them to develop particular strengths. In the AOD field, a worker may seek someone to help develop their knowledge of AOD issues, another to help in knowledge management skills and yet another to develop interpersonal or counselling skills. The mentoring interactions may be a series of short term, even one-off, sequential collaborations.

The self-managed model has enormous potential to encourage spontaneous mentoring. Instead of developing a formal mentoring program, a program aimed at equipping workers to undertake this process may be implemented, which includes training workers to identify their individual mentoring needs. It is important that workers understand when mentoring is needed, their own unique developmental patterns, the most appropriate form of mentoring, and how to proceed. It would also include establishing policies and procedures that support this process and provide effective incentives.

The self-management model is a systems model of mentoring, with inputs, outputs and transformation processes. The inputs include resources such as the mentor, peers, specialists and materials. These inputs are transformed into outputs by a program coordinator through program coordination, education, connection and communication. Finally, the outputs are the benefits of mentoring, which through a feedback loop, become inputs again. Figure 1 shows a diagrammatic representation of the model.

The strengths of this model are that it takes into account the current rapid pace of change and the different mentoring needs associated with different stages of career development. Unlike more traditional models of facilitated mentoring programs, it does not need to function in an organisation. The emphasis on protégé responsibility encourages them to increase their awareness of available support, including potential mentors, as well as other educational resources such as literature and training. Finally, while it results in the close personal contact required for professional development, it also provides flexibility, including the potential for sequential, short term and longer term relationships. These strengths makes the self-management model an ideal mentoring model for the AOD field, where workers may find that the best source of expertise is someone who does not work in the same organisation, or even the same professional discipline.
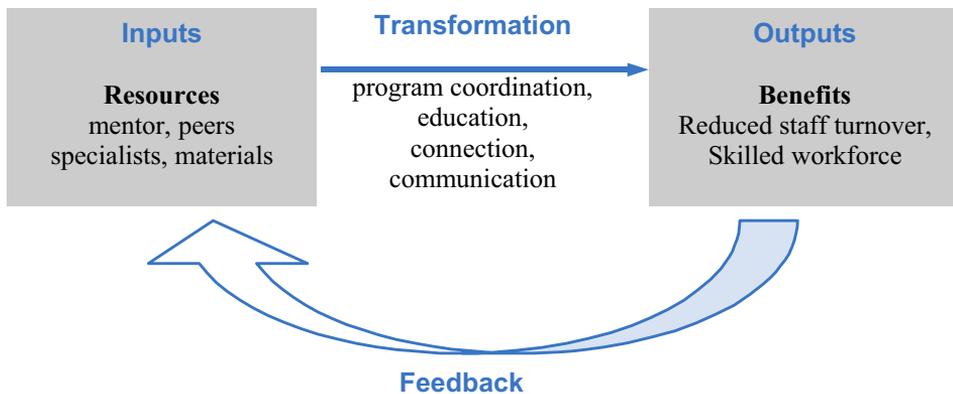
Figure 1: Self-Management Model

Manager Involvement

The role of managers in the mentoring activities of their staff is an important consideration in a mentoring strategy. It seems appropriate to encourage managers to mentor their immediate staff. The frequent contact and common work goals between a manager and their staff create good conditions for spontaneous development of a mentoring relationship (Linney, 1999). It is logical for a worker to turn to their direct manager when seeking guidance or support relating to particular tasks, projects or issues. Similarly, it is the responsibility of a good manager to recognise when their

staff need support and guidance, as well as to recognise staff potential and provide opportunities to build on strengths and address weaknesses. The readiness of managers to adopt a mentoring role becomes increasingly important for workers who have limited access to professional development opportunities, such as those in regional areas (Little, Browne, and Sullivan, 2001).

This is by no means a comprehensive mentoring strategy. In workplaces that are not AOD specific, the manager may have no more AOD experience than their staff, particularly if AOD work is not primary business or specifically funded (Gore, 2001). In addition, it is an unfortunate reality that in many organisations there is a singular focus on immediate performance demands, such as achieving goals and completing tasks. Learning is seen as something that is done outside of work (Ramsey, 2001), reducing the likelihood of spontaneous manager-staff mentoring relationships.

Whether the manager adopts the role of mentor or not, their participation in the mentoring relationships of their staff is a vital consideration in workplace mentoring programs. Consulting with the manager about the mentoring activities of their staff can avoid conflicts with the protégé's regular work activities and responsibilities. It can also help gain the manager's commitment to the relationship by enhancing their awareness of the aim and benefits and reducing the potential for misunderstanding.

Without consultation the manager may feel threatened by the relationship, fearing that their authority is being challenged or feeling envious of the opportunities offered to the protégé (Fowler, 1998; Geiger-DuMond and Boyle, 1995). This raises the very real possibility that the mentoring relationship may be undermined if the manager obstructs the protégé in spending time with the mentor or completing mentoring assignments (Ritchie, 1999). Of equal importance, consultation provides opportunities to outline boundaries. These are needed so that the manager does not become too involved, as this could threaten trust between the mentor and protégé (Ritchie, 1999).

Functions of the Mentor

The functions of the mentor can be divided into career-related and psychosocial (Kram, 1985). Career-related functions, also referred to as vocational functions (Scandura, 1992 cited by Chao, 1997), contribute to the protégé's career advancement and ability to perform tasks related to their AOD work. They include:

Career-related functions
Psychosocial functions

- orientation to the AOD field
- teaching specific skills
- emphasising importance of taking responsibility
- sharing information
- assigning challenging tasks
- encouraging self assessment and critical reflection
- providing advice and guidance regarding career choices
- providing opportunities to interact and build networks with others involved in AOD work.

(Bernard, 1996; Clark, 1995; Koberg, Boss, and Goodman, 1998)

A mentor can help the protégé in this regard because they have greater experience and networks in the AOD field (Kram, 1985). Career-related functions have been found to have a positive influence on job satisfaction, organisational socialisation, and understanding of organisational goals, politics and history (Chao, 1997).

The psychosocial functions of the mentor contribute to the protégé's psychosocial well-being, by helping the protégé to develop a sense of competence in AOD work, identify themselves as an AOD worker and enhance job satisfaction (Kram, 1985; Seibert, 1999). The components of the psychosocial side of mentoring include role modelling, acceptance, counselling and friendship (Kram, 1985). To fulfil this mentoring responsibility, the mentor:

- offers their attention, time and assistance to the protégé
- gives support, feedback and encouragement
- shares personal aspects of their lives, where relevant
- is sensitive to the protégé's feelings.

(Clark, 1995; McNally and Martin, 1998)

These behaviours contribute to the development of an interpersonal relationship between mentor and protégé which is characterised by trust, mutual respect and intimacy (Seibert, 1999). Awareness of the importance of the interpersonal relationship and mentor functions may provide the key to the elusive success of informal mentoring

relationships – the magic ingredient, the personal chemistry so often described. Psychosocial mentoring appears to mediate the career-related functions by influencing how effectively the protégé utilises the mentoring relationship. In short, psychosocial functions seem to act as a feedback loop for career-related functions (Noe, 1988a cited by Chao, 1997). This is illustrated in Figure 2.

Career Functions
Orientation to work
Career advice and guidance
Challenging tasks
Protection
Visibility
etc

Outcomes
Promotion
Salary
Job satisfaction
Organisational socialisation
Sense of self worth
Identity
etc

Feedback
Development of close relationship
Intimacy
Trust
Respect
etc

Psychosocial Functions
Role modelling
Friendship
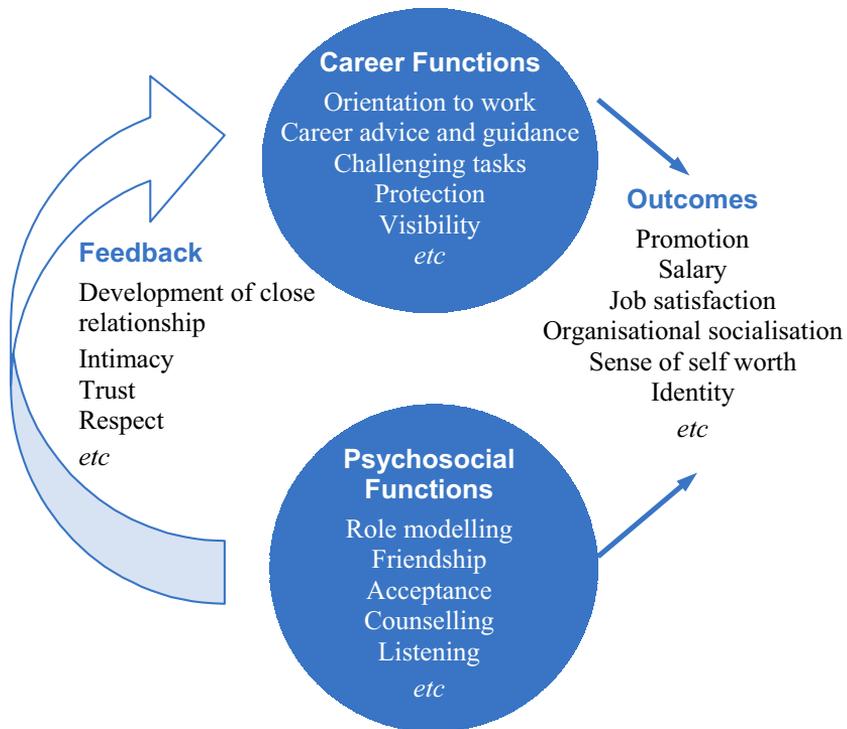Acceptance
Counselling
Listening
etc

Figure 2: Model of Interaction between Career and Psychosocial Functions and Outcomes

Mentor Roles

In order to fulfil the functions described previously, the mentor generally adopts a wide variety of roles.

In the role of communicator, the mentor establishes an environment for open interaction, encourages two-way exchange of information, listens actively to the protégé, plans uninterrupted time with the protégé, and acts as a sounding board for ideas and concerns (Geiger-DuMond and Boyle, 1995). As a counsellor, the mentor identifies the skills, interests and values of the protégé, discusses and evaluates possible options and assists in planning strategies to achieve objectives (Ostroff and Kozlowski, 1993 cited by Chao, 1997; Geiger-DuMond and Boyle, 1995). When coaching the protégé, the mentor helps to clarify developmental needs and performance objectives, teaches skills, reinforces effective behaviour, recommends areas of improvement and introduces the protégé to the goals and objectives of the organisation (Geiger-DuMond and Boyle, 1995).

The mentor may also act as an adviser, providing both formal and informal information about the AOD field and recommending professional development opportunities and strategies to help the protégé identify and overcome potential obstacles (Geiger-DuMond and Boyle, 1995). The mentor may also act as a broker for the protégé by advising of strategies for developing contacts and introducing the protégé to their own network. The broker may also assist the protégé to identify resources and find educational and employment options (Geiger-DuMond and Boyle, 1995; Stone, 1999). When undertaking this brokerage and resource role, the mentor is often termed a referral agent (Geiger-DuMond and Boyle, 1995). The role of savvy insider is similar to adviser and broker. In this role, the mentor provides intuitive and informal knowledge about the organisation or profession and connects the protégé with "the right people" who have either the power or knowledge to further enhance the protégé's learning or performance (Kaye and Jacobson, 1995).

A mentor may act as an advocate or sponsor for the protégé by intervening on the protégé's behalf and representing their concerns to upper management (Geiger-DuMond and Boyle, 1995). This may be through championing the protégé's ideas and interests to those in a position to implement them (Kaye and Jacobson, 1995). A mentor may recommend their protégé for project or promotional opportunities, and

Common Mentor Roles

- teacher
- trainer
- role model
- protector
- sponsor
- counsellor
- coach
- cognitive coach
- adviser
- broker
- referral agent
- advocate
- guide
- ally
- catalyst
- savvy insider

arrange for involvement in highly visible activities (Geiger-DuMond and Boyle, 1995). The role of ally is similar to advocate and sponsor. In addition, the mentor can provide feedback to the protégé, enabling them to identify their own strengths and weaknesses (Kaye and Jacobson, 1995). Sometimes the term "protector" is used to describe the sponsor or ally (Ostroff and Kozlowski, 1993 cited by Chao, 1997). Similarly, the mentor may act as a catalyst to help the protégé develop alternative views of themselves and their environment (Kaye and Jacobson, 1995).

The mentor may act as a guide for the protégé, asking questions and encouraging the protégé to analyse and search for meaning instead of providing ready-made answers. This provides the protégé with experiential learning opportunities to develop their own strategies and techniques for a variety of situations (Kaye and Jacobson, 1995). Commonly, the mentor is a role model, where the protégé observes and emulates the mentor's behaviour (Geiger-DuMond and Boyle, 1995). In contrast, as a teacher, the mentor actively helps the protégé to learn and become socialised into their organisational role (Ostroff and Kozlowski, 1993 cited by Chao, 1997).

It is important to recognise that these described roles are not synonymous with mentoring. A mentor may adopt many or only a few of these roles. In contrast, simply adopting a number of the previously mentioned roles does not necessarily make one a mentor. For example, while a coach may seem similar to a mentor, it is only a limited role because mentoring goes beyond the training involved in coaching and extends to sharing experience, wisdom and political savvy. Generally, mentoring is more open ended than coaching, which is more directed towards immediate tasks. Similarly, role model and sponsor do not adequately capture the essence of mentoring. Both a role model and a mentor positively influence another, but the role model is not necessarily aware of this influence, whereas the mentor is. Alternatively, while both a sponsor and mentor can benefit another by acting on their behalf, the beneficiary may not be aware of the actions of a sponsor, but is aware of those of a mentor.

Indeed, the overlap between mentoring and many other similar relationships is extensive and the boundaries unclear. For example, there is disagreement amongst authors about whether a preceptor or supervisor in nursing or social work can be considered a mentor. Ricer (1998) suggests that a preceptor is not equivalent to a mentor because the relationship exists for a finite period and focuses on clinical competency and professional development. Mentoring, in contrast, is usually a long term relationship, not linked to any formal course or evaluation, which is more personal and nurturing.

The Mentoring Lifecycle

It is widely accepted that mentoring relationships evolve over time, typically passing through four distinct phases (Andrews and Wallis, 1999; Kram, 1985; Winefield, 1998). Generally, the protégé begins in a state of relative dependence and progresses to become more self-reliant and autonomous, growing into a colleague or peer of the mentor (Head, Reiman and Thies-Sprinthall, 1992 cited by Barnett, 1995).

Phase 1: Initiation - Establishing the Relationship

Establishment of the relationship constitutes the first phase, often called the Initiation Phase. This covers the actual formation of the relationship and a settling-in period (Kram, 1985). The protégé recognises the mentor as someone with expertise from whom they can learn about AOD issues and who has useful contacts in the field. The mentor recognises the protégé as someone who will benefit from the AOD expertise and time they have to offer. A major component of the initial phase is learning the style and working habits of the other. Each party may have ideas and assumptions about how the relationship will progress. The career functions of the mentor emerge in this stage, particularly orienting the protégé to the field. Typically this phase lasts from six to 12 months (Kram, 1983 cited by Chao, 1997).

Phase 2: Maintenance - Peak Period

The second phase is the peak period, concerned with maintaining and building on the relationship. This period is also referred to as the Protégé Phase (Hunt and Michael, 1983 cited by Winefield, 1998) or the Cultivation Phase (Kram, 1985). The two learn about each other's capabilities and their interpersonal relationship develops. It is predominantly during this period that the protégé can develop and hone their AOD skills and knowledge and broaden their network of contacts in the field (Andrews and Wallis, 1999). The mentor adopts a variety of roles, including teaching, promoting and protecting the protégé. It is during this stage that the psychosocial functions of the relationship emerge. Both career and psychosocial functions are maximised during this period, which typically lasts two to five years (Kram, 1983 cited by Chao, 1997).

Phase 3: Termination - Decline in Activities

The third phase of the relationship is characterised by a decline in activities. This is referred to as the Separation Phase. The functions of the mentor decrease and the protégé begins to become independent of the mentor (Winefield, 1998). Both a

structural and psychological separation occur. As with the breakup of any relationship, it can be an emotionally stressful time, filled with anxiety, apprehension or defiance.

Frequently, the relationship enters this stage either when the protégé feels confident in their AOD work without the need for the mentor or if either party changes career (Andrews and Wallis, 1999) and is no longer engaged in AOD work. It may take six to 24 months for this phase to run its course. In some cases, this may be the final stage, particularly if the relationship has been dysfunctional or not particularly successful (Winefield, 1998).

Phase 4: Transformation

In the final phase, there is some kind of transformation in the relationship. This phase is often called the Redefinition or Friendship Phase. This may mean a complete end to the relationship, but more often it develops into a lasting friendship (Andrews and Wallis, 1999; Winefield, 1998). Contact becomes more informal, characterised by mutual support. This may be the longest phase of the relationship, with the pair possibly retaining contact as peers or colleagues for an indefinite period (Kram, 1983 cited by Chao, 1997). The protégé continues to utilise the lessons learned during the peak period of the relationship in both this and the Separation Phases, prolonging the positive outcomes of mentoring, hopefully indefinitely (Chao, 1997). The changes over time in a mentoring relationship are similar to those of a parent-child relationship. Just like a parent adjusting to their child growing up, it is important that the mentor adjusts to the changing relationship as the protégé's level of knowledge and expertise expands (Darling, 1984).

Box 2: History of Mentoring

Early History

The concept of mentoring is far from new. As well as being common in modern times, particularly since the 1970s (Fowler, 1998; Scandura, 1998), its use extends way back to ancient Greece. Instances of such a relationship can also be found at many other points in history in between.

As frequently cited in the mentoring literature, perhaps the earliest reference to this type of relationship, and in fact the origin of the term "mentor", is found in Homer's "Odyssey" (Anderson, 1999; Caravalho and Maus, 1996; Balint et al, 1994 cited by Clark, 1995; Fowler, 1998). Before embarking on his odyssey, Ulyssess arranged for his friend, Mentor, to act as a surrogate father for his son Telemakhos. This involved Mentor acting as adviser, protector and friend. Mentor possessed many of the characteristics that have been found to be valuable in the modern day mentor – patience, wisdom, selflessness and willingness to engage in a long term (in this case, lifetime) relationship with the protégé. The outcome of the relationship was that Telemakhos developed skills and knowledge that enabled him to meet the challenges encountered throughout his life. The relationship depicted in the Odyssey was not unique in ancient Greek society. It was customary for a father to arrange for an older male friend or relative to develop a relationship with his son to teach him the skills and values he would need to succeed in society and life (Murray, 1991).

Examples of mentoring-type relationships are found at other times throughout history. One example is the craft guilds from the Middle Ages which structured many professions, such as merchant, lawyer and goldsmith (Murray, 1991). This method contributed to control of work quality and wages. Young boys were apprenticed to a master tradesman, often living with the mentor's family, taking over the shop or business upon the master's retirement, and of course eventually becoming a master himself. Through this arrangement, the apprentice learnt skills and established valuable social and political connections, the master gained an assistant and someone to carry on his legacy, and the quality of the craft or profession was maintained. With the evolution of the industrial society, this type of relationship became the employer/employee relationship and the focus shifted from quality and tradition to profit, and the goals of the employer and employee were no longer necessarily congruent. Despite this change, the master-apprenticeship relationship of modern times can be considered a form of mentoring (Fowler, 1998).

Informal mentoring was also common in the time between ancient Greece and today, as indicated by historical records of famous individuals (Murray, 1991). Notable examples include Sir Thomas Moore, author and statesman who was mentored in the 1490s by Thomas Linacre, physician, classical scholar, priest and founder of the Royal College of Physicians (Walsh, 2001). Another example is the relationship between Impressionist painters Mary Cassat and Edgar Degas. Degas' art and ideas had considerable influence on Cassat – he introduced her to Impressionism and helped her gain entry to many important exhibitions (Lane, 2001).

Recent History and Current Use of Mentoring

Mentoring appeared to undergo a rebirth in the 1970s (Fowler, 1998) and has remained popular since (Scandura, 1998). It is often seen as a phenomenon from the business and management field, but is also used in many other disciplines (Fowler, 1998). Seibert (1999) cites a number of surveys that indicate that for a range of industries, occupations and organisational levels, one to two-thirds of employees have been involved in a mentoring relationship at work (Seibert, 1999). (Seibert, 1999 cites Burke, 1984; Chao, Walz and Garnder, 1992; Higgins and Nohria, 1994; Fagenson, 1989; McShulskis, 1996; Ragins and Cotton, 1991; Ragins and Scandura, 1994; Roche, 1979; Zey, 1991). The literature of a wide range of disciplines refers to mentoring. For example there is extensive reference to mentoring for new teachers (referred to as novices), (Barnett, 1995; McNally and Martin, 1998) librarians (Ritchie, 1999) and local government (Caravalho and Maus, 1996). Mentoring is also common in education as a tool to develop high achieving students or overcome difficulties for disadvantaged students (Anderson, 1999; Edwards, Kennedy, and Kennedy, 1993). More recently, it has been a popular method of increasing the opportunities available to minorities and women and for orientation of new staff (Fowler, 1998). Mentoring has existed in fields such as medicine, law, nursing and social work for some time, although the term "mentor" may not have been used. For example, in medicine it is often referred to as internship (Linney, 1999), in nursing as preceptorship (Andrews and Wallis, 1999) and in social work as supervision (Ritchie and Connolly, 1993).

Research on Mentoring

Research on the effectiveness of mentoring has occurred since about the 1980s (Chao, 1997). It has been explored along a number of dimensions, including the phases of mentorship, the role of the mentor and outcomes of mentoring (Chao, Walz, and Gardner, 1992). These will be discussed in a later section in this monograph. Generally, research has been conducted on informal, spontaneous relationships, and less frequently on structured mentoring programs (Seibert, 1999). Unfortunately, it is difficult to examine the effectiveness of mentoring experimentally, and virtually impossible to study it using the gold standard of randomised controlled trials. This is due to a number of factors, including the often spontaneous nature of the relationship, which frequently is not even recognised as such until it is looked back upon (Linney, 1999). Determining causation is problematic because it is difficult to isolate the effects of mentoring from other factors, such as the nature of the protégé (how much of the benefits attributed to mentoring are due to the talent, ambition or hard work of the protégé?) and benefits from other staff development activities (Seibert, 1999).

Why?

Why adopt a mentoring strategy?

Objectives & Importance

From a workforce development perspective, the primary objective of mentoring is to improve and maintain quality of services (Murray, 1991). For the AOD workforce, this means maintaining and improving the overall response to AOD issues.

Clearly, this includes sustaining the skill and knowledge base of the workforce. This is reminiscent of the traditional notion of mentoring, whereby the master nurtures the apprentice to take over upon retirement (Fowler, 1998). In modern day terms, this is part of a succession planning strategy - ensuring that there are sufficient, suitably equipped workers to absorb the effects of staff turnover (Murray, 1991). This is increasingly important in the AOD field, as the demand for services continues to rise, without an equivalent increase in funding (Pitts, 2001). In addition, there is increasing competition with other health and welfare organisations for limited resources (Evans, 2001). This has been accompanied by increasing calls for access to regular and supportive supervision to support education and training (Pitts, 2001).

Objectives of Mentoring

- sustaining skill and knowledge base
- addressing recruitment and retention issues
- offering incentives and support
- emphasising role of generalists
- enhancing collaboration
- managing change

Mentoring can play a key role in succession planning by supporting transfer of the implicit knowledge of the seasoned practitioner to the protégé. It is common in the AOD field for skill and knowledge development to occur through interaction with more experienced workers or peers (Knapper, 2001; Pitts, 2001). This can be particularly important for those whose pre-service training may not have equipped them with sufficient knowledge and skills to respond to AOD issues.

Effective succession planning, however, is more than upskilling workers. It is also vital to address recruitment and retention issues. This has become increasingly difficult for the AOD field in recent years (Pitts, 2001). Many agencies have expressed difficulty in filling vacancies, even in the face of sufficient funding. A recent survey by Pitts (2001) identified lack of qualified staff, limited public support for working with drug users, insufficient salary or other remuneration, limited scope to advance, and difficult working environments as key factors.

The opportunity to participate in a mentoring relationship can be a powerful incentive, potentially more so than salary and other benefits (Clark, 1995; Moore, 1992). Perhaps this is because it is expected to enhance career opportunities through a more rapid acquisition of skills and knowledge, assistance in career planning and introduction to

a network of useful and powerful contacts (Clark, 1995; Murray, 1991). Hence, an offer of mentoring may offset the issues of limited remuneration and scope to advance that are endemic in the AOD field (Pitts, 2001).

A mentor is also viewed as a vital source of support, helping the protégé to find solutions, avoid pitfalls and learn to manage stress. In addition, the offer of mentoring contributes to a feeling of being valued (Clark, 1995; Murray, 1991). These are both vital in the AOD field where work is often perceived as stressful, heart breaking and thankless. Support and feeling valued can help alleviate the stigma of public perception (ie negative attitudes towards those who use or have dependency on alcohol or other drugs) and difficult working environments, as well as contribute to the prevention of staff burnout (Pitts, 2001).

The emerging public health perspective in recent years has resulted in recognition that not only AOD specialists, but a range of human service workers, particularly those from health, education and law enforcement backgrounds, have the potential and responsibility to respond to AOD issues (Allwell, Goldsmith, Osborne, and Rolfe, 2001; Gore, 2001; NCETA, 1998). Unfortunately, many of these workers have insufficient education, training or experience to realise their potential in this role (NCETA, 1998). The result may be limited confidence relating to role adequacy, competency, legitimacy or support (definitions for these terms are given in Box 3) resulting in limited commitment to work involving AOD issues. Mentoring has the potential to address all four of these role issues, as the mentor is a source of support, information and skill development

In addition, collaboration amongst these different groups is vital in the response to AOD issues. Unfortunately, these groups are often isolated from one another as a result of administrative structures, demarcation of roles, conflicting paradigms of drug use behaviour, or failure to recognise their unique role in AOD (Gore, 2001; Roche, 2001). A key aim of mentoring in a comprehensive workforce development strategy is to enhance collaboration both between and within disciplines, services and knowledge domains.

The AOD field is dynamic and constantly changing, with fluctuations in drug use patterns, shifting public

Box 3: Role Perceptions

- Role adequacy:
  perceived knowledge and skills relating to AOD work

- Role competency:
  perceived ability to respond to AOD issues

- Role legitimacy:
  belief that AOD issues are a legitimate part of the work role

- Role support:
  access to support and advice on AOD issues

attitudes towards drug users, changes in funding and resource allocation, and innovations in treatment and prevention (NCETA, 1998). With this comes the requirement of a flexible workforce. Thus, another objective of mentoring in workforce development is to help workers to adapt to changing work environments. Unlike education and training, mentoring does not usually require time away from the workplace, it has direct relevance to issues and challenges encountered at work, and is ongoing, economical and flexible, particularly with respect to time and frequency of mentoring activities.

Benefits (and Risks)

It is clear that mentoring offers a number of potential benefits for organisations involved in AOD work, as well as the mentors and protégés participating in mentoring relationships. Unfortunately, there are also potential risks. The key to minimising these risks is awareness. The potential benefits and risks for organisations, mentors and protégés are discussed in this section.

Benefits for the Protégé

The primary benefit of having a mentor is the opportunity, within a safe and non-threatening relationship, to interact with and learn from someone with experience and contacts in the AOD field (Clark, 1995; Ganser, 1999; Murray, 1991). Through observation, discussion, completion of assigned tasks and feedback, the mentor and protégé work together to:

- establish goals and objectives and plan how to achieve them
- identify and develop strengths and overcome weaknesses
- develop skills and knowledge
- solve problems
- determine how and where to find further information
- explore career options
- learn coping strategies.

(Clark, 1995; Murray, 1991)

Benefits for the Protégé

- **opportunity to learn from someone with AOD experience**
- **support which builds confidence and maintains motivation**
- **access to a positive role model**

Potential Risks

- **dysfunctional mentoring relationship**
- **unrealistic expectations**
- **possessiveness or over-protection by mentor**
- **over-dependence on mentor**
- **jealousy and gossip from coworkers or supervisor**

In addition, through listening (Clark, 1995; Coombe, 1995; Murray, 1991), the mentor provides support and encouragement during setbacks, difficulties and other work pressures (Clark, 1995). They help the protégé to build confidence and maintain motivation (Freeman, 1997; Linney, 1999) by offering them professional and social support and teaching coping strategies (Freeman, 1997). Accompanying the mentor in various situations gives the protégé a chance to observe their role model in action and widen their contacts.

Potential secondary outcomes resulting from these primary benefits include:

- greater likelihood of success and reduced likelihood of failure
- greater satisfaction with AOD work
- greater likelihood of developing a desired career path and avoiding career options that are unsuitable or will have a negative impact
- avoidance of or coping with stress, frustration and burnout.

(Murray, 1991; Winefield, 1998)

Potential Risks

In entering into a mentoring relationship, the protégé faces potential risks from outside the relationship (reactions from others), as well as within the relationship (interaction between mentor and protégé). Those outside the mentoring relationship include the protégé's supervisor and co-workers, and the mentor's staff. The protégé's supervisor may be concerned about the time and attention the protégé gives to the mentoring relationship (or their AOD work if this is not their core business), fearing that the protégé will neglect their primary responsibilities (Murray, 1991) or that the mentor's advice may conflict with their own (Fowler, 1998). The supervisor may be only concerned with performance, viewing professional development as a cost rather than an investment - something to be done outside of work, either before appointment to a position or outside of working hours (Murray, 1991; Ramsey, 2001).

It is also possible for the supervisor to perceive the mentoring relationship as a personal threat, particularly if the mentor has power or influence over the supervisor (Murray, 1991). They may be concerned about the protégé giving a negative impression of the supervisor to the mentor, that the mentor will undermine their authority (Fowler, 1998) or they may resent their staff member suddenly gaining access to information, contacts and special treatment that they themselves do not have (Murray, 1991). The result may be subversive behaviour by the supervisor to undermine the relationship or inhibit the career progress of the protégé.

The relationship between the mentor and protégé may produce jealousy or gossip amongst the protégé's coworkers or the mentor's staff (Clark, 1995). There may be accusations of favouritism, which can be exacerbated if the mentor reacts by overcompensating, either consciously or unconsciously treating the protégé more harshly than others (Stone, 1999). Cross-gender relationships are particularly vulnerable, potentially leading to speculation that the relationship has a romantic or sexual underpinning (Clark, 1995).

A dysfunctional mentoring relationship is another risk faced by the protégé (and the mentor), both of who can contribute to deterioration in the quality of the relationship. The relationship may become dysfunctional if the mentor violates a crucial element of the mentoring relationship - trust. This may range from a minor breach, such as not

keeping commitments, to betrayals as significant as taking credit for the protégé's work, exploitation (Levinson et al., 1978 cited by Ragins and Scandura, 1999) or undermining the protégé's career prospects (Murray, 1991). The latter may occur if the mentor feels threatened, worrying that the protégé will become too skilled and supplant them (Clark, 1995).

Dysfunction may also occur if either the mentor or protégé becomes too attached to the relationship. This can impinge on the protégé's ability to grow and develop independently. The mentor, for example, may become possessive or over-protective of the protégé, undermining the protégé's other work-related relationships, and competing for their time and priority (Murray, 1991). The risk increases if the mentor has a strong vested interest in the protégé's success, for example, if they feel the protégé's success or otherwise will reflect upon their skills as a mentor. As a result, the mentor may undertake some of the protégé's tasks (Murray, 1991).

Similarly, there is a risk that the protégé may become overly dependent on the mentor, relying too heavily on the mentor's guidance and advice, and becoming unable to make decisions for themselves or take responsibility for their own development (Murray, 1991). This is in stark contrast to a key desired outcome of mentoring, which is for the protégé to develop into a deep and self-sufficient learner.

Unrealistic expectations, particularly about the role of the mentor, can also lead to problems in the relationship, leading to bitterness on behalf of the protégé. There may be a significant difference between the expectations of the protégé and mentor regarding :

- the time and commitment the mentor will give to the relationship
- opportunities that the mentor can guarantee for the protégé
- progress towards achieving mentoring goals and objectives.

(Murray, 1991; Scandura, 1998)

Benefits for the Mentor

The role of mentor offers the potential for both personal satisfaction and tangible work-related benefits. A primary source of satisfaction comes from helping someone else - sharing knowledge and experience, providing support and contributing to the development of another (Clark, 1995; Ragins and Scandura, 1999; Winefield, 1998). This is satisfying because the mentor feels that their skills and experience are valued. It is like passing on their legacy to a new generation of AOD workers (Ganser, 1999). This type of satisfaction is particularly appealing to those who are at the end of their working lives, or feel disheartened about their work, and have declining aspirations and commitment to the field (Levinson et al., 1978 cited by Ragins and Scandura, 1999; Winefield, 1998).

The satisfaction generated by the mentoring role can also give the mentor renewed commitment and enthusiasm for AOD work, lifting their spirits and revitalising their interest, particularly if their protégé is enthusiastic and zealous about the field. Often, the protégé brings with them alternative views that stimulate the mentor's thinking (Murray, 1991). The protégé may be fresh from school or university, carrying a certain idealism and awareness of new innovations and technical advances, or a seasoned veteran from another human services discipline, bringing a wealth of experience in the workforce and a complimentary theoretical background.

Self-confidence and self-esteem are enhanced as a result of this satisfaction and renewed enthusiasm (Bernard, 1996; Moore, 1992; Murray, 1991). The closeness and mutual respect of the mentoring relationship also contribute confidence and self-esteem (Moore, 1992; Murray, 1991), with the mentor recognising that they are admired, respected and noticed (Murray, 1991).

In addition to personal satisfaction, the mentor also gains more objective, work-related benefits from participating in the relationship (Kram, 1985). The different experience and background of the protégé offers the mentor an opportunity for the mentor to gain new skills and knowledge through discussion and exchange of information and ideas (Clark, 1995; Moore, 1992). Mentoring also contributes to the mentor's professional development as they are able to practice and improve skills in management, communication, and encouragement and motivation of others (Coombe, 1995; Moore, 1992).

It is common for the protégé to work on particular projects with the mentor to gain skills and experience. This offsets the increased effort of mentoring by reducing the mentor's workload (Murray, 1991). A mentor may also be offered rewards for their role. These may be tangible rewards such as a bonus, increased pay or a promotion

Benefits for the Mentor

- **personal satisfaction from helping someone else**
- **renewed commitment and enthusiasm for AOD work**
- **stimulated thinking**
- **opportunity to develop new skills**
- **assistance on projects and reduction in workload**
- **opportunity for rewards**

Potential Risks

- **stress, burnout**
- **neglect of other duties**
- **role conflict**
- **accusations of nepotism and favouritism**
- **poor performance of protégé reflecting badly on mentor**
- **displacement by overly ambitious or successful protégé**

(Murray, 1991), or less tangible rewards, such as recognition from peers and superiors for their effort and contribution to the field (Ragins and Scandura, 1999).

Potential Risks

Adopting the role of mentor presents risks related to the associated responsibilities, outside parties and the protégé. The effort required to develop and sustain a mentoring relationship can be problematic if the mentor does not have sufficient time and energy, potentially resulting in stress, burnout, neglect of other duties or role conflict (Wilson, 1989 cited by Andrews and Wallis, 1999; Winefield, 1998). Lack of vital mentoring skills, such as the ability to give constructive feedback or help with career planning, can also produce these results. Refusal to admit to and address limitations can exacerbate these problems.

As with the protégé, the mentor may be exposed to accusations of nepotism or favouritism. Such accusations may damage the mentor's reputation (Myers and Humphreys, 1985 cited by Ragins and Scandura, 1999; Winefield, 1998). The mentor's reputation can also be affected by a poorly performing protégé, which may be perceived as a reflection of the mentor's judgement and competency (Kram, 1985; Winefield, 1998). An overly successful or motivated protégé can also harm the mentor, either intentionally or unintentionally, by being so successful that they displace the mentor (Halatin and Knotts, 1982 cited by Ragins and Scandura, 1999; Winefield, 1998). Even worse, the protégé may compete with the mentor, and even go so far as to engage in aggressive behaviours (Murray, 1991). The likelihood of these problems arising diminishes as the gap widens between the mentor and protégé in the organisational hierarchy (Murray, 1991).

Benefits for Organisations

Mentoring offers many benefits for organisations related to the AOD field. Mentoring can enhance the ability to respond to AOD issues by improving effectiveness (Clark, 1995), fostering innovation and increasing the pool of skilled and experience workers. It is also an important incentive and source of support for AOD workers (Pitts, 2001). Mentoring can create a better work environment, reduce staff turnover, maintain motivation of seasoned workers and improve recruitment efforts (Clark, 1995; Moore, 1992). It can help build morale through recognition of the knowledge and expertise of mentors and the potential of protégés (Clark, 1995; Murray, 1991).

A mentoring strategy can contribute to communication within organisations and the field. Through the mentor, information regarding values and culture are conveyed to the protégé, who then develops increased understanding of, and commitment to, the field (Moore, 1992; Murray, 1991). Mentoring relationships between workers from different departments, disciplines or perspectives provide insight into each other's

functioning and assumptions. This information may then be passed on to others in the mentor's or protégé's immediate working environment.

Transfer of knowledge is a particularly important type of communication. By utilising pre-existing expertise within the field, mentoring ideally moves knowledge from those with the most experience of AOD work to those with the least (Geiger-DuMond and Boyle, 1995), prompting a faster learning curve by those who are mentored (Wilson and Elman, 1990 cited by Scandura, 1998). The result is a greater pool of workers experienced in AOD work (Geiger-DuMond and Boyle, 1995), and provides a concrete method of moving people into jobs with a greater AOD focus (Murray, 1991). This promotes continuity within the field and helps with strategic and succession planning (Clark, 1995).

The cost effectiveness of mentoring is a particularly appealing benefit for organisations with limited funding (Howard, 1999). Compared to other professional development methods, it is both effective and inexpensive. The protégé has the opportunity to learn and practice desired skills without the costs of traditional training, such as costs relating to room hire, trainer fees and time away from the workplace (Murray, 1991). In addition, mentoring results in development of skills and knowledge that are directly pertinent to the work context and addresses issues and problems encountered by the protégé in their daily work.

Benefits for the Organisation

- **improved response to AOD issues**
- **source of incentive and support**
- **enhanced communication**
- **transfer of knowledge**
- **continuity**
- **cost effectiveness and relevance to the workplace**

Potential Risks

- **cost and complexity of administration**
- **lack of empirical data**
- **difficulties with promoting mentoring programs**
- **difficulty justifying program to those who allocate resources and funds**
- **conflict with prevailing culture**

Potential Risks

Administration of a mentoring program can be complex (Murray, 1991). The program needs to be promoted to staff, followed by recruitment, selection, pairing and support of mentors and proteges, and evaluation of the program. Promotion of the program may be difficult because there is limited empirical data on the effectiveness of structured mentoring programs. The lack of data may also mean the program seems unjustified, resulting in lack of support for the program from those with the power to distribute resources and funds (Murray, 1991). Finally, the idea of mentoring may clash with the prevailing organisational culture (Clark, 1995; Murray, 1991).

How?

How is mentoring done?

Key Factors

Five groups of factors impact on the effectiveness of mentoring. These are the characteristics of the mentor, protégé, mentoring relationship, mentoring program and work environment (usually within an organisation). They are outlined below.

Mentor Characteristics

The characteristics of a successful mentor can be grouped into six categories. These are:

- interpersonal skills
- knowledge of organisation, field or profession, including technical competence
- teaching skills
- management skills
- commitment to the mentor role
- other personal attributes.

> **Key Mentor Characteristics**
>
> - interpersonal skills
> - knowledge of organisation, field or profession, including technical competence
> - commitment to mentor role
> - teaching skills
> - management skills
> - other personal attributes

Well developed interpersonal skills are crucial to the development of the close personal relationship between mentor and protégé. A vital characteristic of the mentor is to be people-oriented (Clawson, 1979 cited by Barnett, 1995), that is to enjoy being with people more than working alone or with inanimate objects (such as machines or technology) (Everitt and Murray-Hicks, 1981 cited by Murray, 1991). It is also desirable for the mentor to have some degree of charisma and personal power (Everitt and Murray-Hicks, 1981 cited by Murray, 1991). Communication skills are cruicial (Bernard, 1996), especially the ability to listen actively and effectively (Carruthers, 1993), as well as to speak clearly and articulately (Everitt and Murray-Hicks, 1981 cited by Murray, 1991). The degree to which the mentor is approachable, accessible and accepting will influence the degree to which a close relationship is fostered (Carruthers, 1993; Darling, 1984; Linney, 1999), as will their ability to be sensitive to the needs of the protégé and to nurture and support them. Other central characteristics required for fostering a close mentoring relationship are that the mentor is warm, patient, caring and empathic (Alleman, 1982 cited by Barnett, 1995). It is not only important for the mentor to regularly exhibit these characteristics, but to be effective in different interpersonal contexts and to exhibit emotional stability (Rowley, 1999).

A protégé seeking an AOD mentor is likely to be seeking increased knowledge about the field (Clark, 1995; Stone, 1999). As such, it is a fundamental requirement that

the mentor possesses such knowledge. This includes knowledge of important issues facing the field and access to both formal and informal communication channels (Everitt and Murray-Hicks, 1981 cited by Murray, 1991). Two aspects of this are an extensive network of contacts and status, prestige and influence (Everitt and Murray-Hicks, 1981 cited by Murray, 1991; Stone, 1999). A high status mentor will know more about the field and thus will be better positioned to guide the protégé in this regard. In addition, the prestige associated with high status increases the likelihood that the protégé will want to emulate the mentor (Everitt and Murray-Hicks, 1981 cited by Murray, 1991). It is also important that the mentor possesses technical competence and job skills in AOD work (Everitt and Murray-Hicks, 1981 cited by Bernard, 1996; Murray, 1991).

Obviously, a fundamental feature of a good mentor is the ability to teach or faciliate a learning experience. This involves understanding motivation and the ability to self-analyse so as to make mechanisms of self-learning explicit (Ganser, 1999). It also entails being a good role model, in particular a good model of continuous learning (Rowley, 1999). Another important skill is the ability to identify opportunities for the growth of the protégé, such as events that contribute to their knowledge and experience (Wasden, 1988 cited by Barnett, 1995). A good mentor is also able to instil an appropriate philosophy in the protégé (Caravalho and Maus, 1996).

The mentor role also incorporates key management skills, including the ability to plan, appraise performance, give feedback, coaching and supervisory support and delegate (Everitt and Murray-Hicks, 1981 cited by Murray, 1991). Planning skills are necessary for the mentor to help the protégé set goals, produce a plan of action and estimate resource and time requirements. In order to appraise performance, the mentor needs the ability to observe the protégé's performance, evaluate it and determine the appropriate type of feedback. Feedback is effective if it is provided clearly and reinforces desired behaviour. When modelling, the mentor demonstrates techniques for undertaking particular activities. Finally, delegation requires the ability to match tasks with the protégé's current skill level, negotiate completion of tasks and provide advice. It is also vital that the mentor recognises and acknowledges the achievements of others (Stone, 1999) and shares credit (that is, will not feel the need to claim the protégé's work as their own) (Everitt and Murray-Hicks, 1981 cited by Murray, 1991).

An important, but perhaps overlooked, attribute of an effective mentor is commitment to the mentor role (Carruthers, 1993; Rowley, 1999). This requires a clear understanding of the role (Bernard, 1996), belief in the potential of the protégé (Conway, 1996), and sufficient time to spend with the protégé (Carruthers, 1993). Dedication to developing mentor skills through training, conference attendance and other professional development activities is also important (Rowley, 1999).

Personal qualities of a good mentor include considerable experience, adaptability (Bernard, 1996), receptiveness to new ideas (Carruthers, 1993), awareness of their own personal strengths and weaknesses (Bernard, 1996), and the ability to communicate

hope and optimism to the protégé (Rowley, 1999). It is also vital that the mentor is patient, willing to take calculated risks, and supportive if the protégé falters (Everitt and Murray-Hicks, 1981 cited by Murray, 1991).

Protégé Characteristics

Three characteristics improve the likelihood that the protégé will reap significant rewards from the mentoring process – motivation, ability and readiness to learn. A motivated protégé will take responsibility for their growth and development (Murray, 1991; Stone, 1999). This type of person generally has a desire to achieve results (Stone, 1999) and actively seeks out challenges and new responsibilities (Murray, 1991; Stone, 1999). They are generally intelligent and self aware (Fowler, 1998) and have a history of taking initiative (Stone, 1999). The ability of the protégé is manifested in several ways, in particular, well-developed skills in more than one area (Murray, 1991) and a previous history of success (Stone, 1999). Potential to further develop skills and to succeed in a more senior position are also important (Murray, 1991). The protégé who is ready to learn will be willing to participate in the mentoring relationship, open-minded (Fowler, 1998) and receptive to positive and negative feedback (Fowler, 1998; Stone, 1999). They are prepared to consider their own weaknesses (Fowler, 1998) and welcome help in identifying them (Stone, 1999). In contrast, it is also important that the protégé is prepared to challenge the mentor's views (Fowler, 1998).

> **Key Protégé Characteristics**
>
> - **motivation**
> - **ability**
> - **readiness to learn**

Characteristics of the Relationship

An essential element of successful mentoring is the quality and nature of the relationship between mentor and protégé (Earnshaw, 1995 cited by Andrews and Wallis, 1999). The most frequently cited characteristics required to make the relationship a success are mutual respect, trust and confidentiality (Andrews and Wallis, 1999; Barnett, 1995; Edwards, Kennedy, and Kennedy, 1993; Fowler, 1998; Stone, 1999). These qualities help create a safe environment and are vital ingredients for the development of an interpersonal relationship and fulfilment of psychosocial mentoring functions (Linney, 1999; Seibert, 1999). Without them, the protégé may not feel comfortable revealing their true thoughts and feelings to the mentor, which will hamper communication (Stone, 1999). Trust, respect and confidentiality are established by setting clear boundaries and sharing insights. The relationship might be intimate, intense and emotional (May et al., 1982 cited by Andrews and Wallis, 1999), or it may be a more formal alliance (Hunt and Michael, 1983 cited by Andrews and Wallis, 1999). This will depend on the circumstances and consequent implications of the development of psychosocial mentoring functions. Regardless, a partnership approach is important

(Andrews and Wallis, 1999). It is also important that the relationship is flexible in relation to timing and frequency of meeting and issues to be discussed (Edwards et al., 1993). Regular meetings (Geiger-DuMond and Boyle, 1995), frequent and appropriate contact (Andrews and Wallis, 1999), setting standards and goals, and allowing mistakes (Allen and Poteet, 1999) also contribute to the interpersonal relationship.

Development of an interpersonal relationship requires compatibility between mentor and protégé, although if they are too similar, they may avoid discussing issues about which both feel uncomfortable. In contrast, if they have different personalities they may give each other valuable insights and challenge each other, thereby promoting personal growth (Fowler, 1998). Gender and race are often cited as important considerations in compatibility. The argument is that the psychosocial functions of mentoring are stronger in same gender and race pairs (Koberg, Boss, and Goodman, 1998). Reasons given for this are that the protégé is more likely to see the mentor as a social role model (Ragins and McFarlin, 1999) and that cross-gender and race relationships are susceptible to difficulties such as stereotypes, attributions, tokenism and power imbalance (Whitely, Dougherty and Dreher, 1991 cited by Koberg et al., 1998). Of course, other considerations may override any gender or race effects. Development of a close relationship is enhanced if the pair care for each other and enjoy being together.

> **Key Characteristics of the Mentoring Relationship**
>
> · **close interpersonal relationship characterised by mutual respect, trust and confidentiality**
> · **safe environment**
> · **partnership**
> · **flexibility**
> · **mentor and protégé compatibility**

Characteristics of the Mentoring Program

A number of factors contribute to the effectiveness of formal programs. One of these is clarity, that is, the purpose and objectives of the program are clear to all involved (McBain, 1998), including mentors, protégés, and others who may influence the mentoring relationship, such as supervisors or co-workers. All those involved need a clear understanding of the behaviour and responsiblities expected of them. It is also important that the program is consistent with the culture of the organisation and other professional development activities (McBain, 1998). Mentoring is more likely to be effective if it is integrated with other professional development activities, such as training, recruitment and performance appraisals (Murray, 1991). Ongoing support for the program at higher organisational levels is also necessary (Clark, 1995; Murray, 1991).

Selection and matching of mentors and protégés is a crucial step in any mentoring program. Voluntary participation and matching may improve outcomes, as motivation is likely to be higher. However, those who volunteer to participate may not necessarily be appropriate in the mentor or protégé role. As such, it is important that those involved understand that not everyone is suited to be a mentor or protégé, and further selection may be necessary (Clark, 1995).

Administration of the program is imperative. This means providing initial training and ongoing support to participants, both mentors and protégés (Clark, 1995; Freeman, 1997; Ganser, 1999; McBain, 1998). Support may take the form of resources (Clark, 1995) or the opportunity to discuss their experience of the program with other mentors or the program coordinator. Time is another form of support, that is, sufficient time released from other obligations to engage in mentoring activities (Ganser, 1999). Reward systems provide key support mechanisms (McBain, 1998). This is particularly relevant to the mentor, as the rewards may not be as obvious or tangible as they are for the protégé. Rewards may take the form of financial incentives, time off or simply recognition of their efforts (Murray, 1991). As with mentoring relationships, flexibility and sensitivity are key considerations in the administration of a mentoring program (Freeman, 1997). Regular monitoring, review and evaluation of the program are vital (Clark, 1995).

Key Characteristics of a Mentoring Program

- **clear purpose and objectives**
- **consistency with organisational culture**
- **integration with other professional development activities**
- **careful selection and matching of mentors and protégés**
- **training and ongoing support**
- **flexibility and sensitivity**
- **ongoing evaluation**

Characteristics of the Work Environment

The characteristics of the work environment will impact on both success of mentoring and development of informal mentoring relationships. These factors relate largely to whether mentoring is consistent with the prevailing organisational culture (McBain, 1998). The type of culture that supports mentoring is one where investment in people is seen as important (McBain, 1998) and continuous learning is encouraged and valued (Lindenberger and Zachary, 1999). In this environment, mentors are more likely to receive both recognition and reward (McBain, 1998). In the absence of such an environment, potential mentors are likely to experience conflict between their mentoring and substantive roles (Andrews and Wallis, 1999).

In a culture supportive of mentoring, there will be fairly low competitiveness, high trust, good communication, high social support and high contact between workers. Problems and responsibilities will be openly shared and staff at various levels will share positive attitudes and rapport (Kram, 1985). In contrast, mentoring is unlikely to flourish in an environment where time is limited and there is little support for the process (Andrews and Wallis, 1999).

Key Characteristics of the Working Environment

- commitment to investing in people
- continuous learning
- low competitiveness
- high trust
- good communication
- high social support and contact between workers
- shared problems and responsibilities

Formal Mentoring Program

The guidelines below relate to developing and implementing a formal mentoring program. These guidelines can be used both within and across organisations. Formal programs can also be implemented across disciplines, for example, a professional society or peak body may want to implement a mentoring program for its members. There are four stages to developing a formal mentoring program – assessing readiness, preparation, implementation and evaluation.

Assessment

A mentoring program can be a cost effective method of staff development or continuing education for the organisation, provided a careful analysis of the organisation is conducted to determine the appropriateness of undertaking a mentoring strategy. The following factors are important to consider:

> **Assessing Organisational Readiness**
>
> · **need**
> · **cultural consistency**
> · **resource availability**

- need - does the organisation need a mentoring program?
- cultural consistency - is a mentoring program consistent with the prevailing culture of the organisation or workplace?
- resource availability - are there sufficient resources to implement the program?

If a mentoring program is deemed appropriate, these factors will also determine the scope of the program. Scope includes the time period (long term, short term or temporary) and the degree to which the program is implemented across different organisational levels and departments. It is advisable to begin with a limited scope when first implementing the program and expand after a pilot or testing period (Murray, 1991).

Need can be assessed against current and future human resource requirements. Issues impacting on current needs include recruitment and retention rates, current strengths and development objectives of the organisation (Lindenberger and Zachary, 1999), and the need for new skills due to trends and technological developments (Murray, 1991). For example, development of new pharmacotherapies such as naltrexone and buprenorphine to assist with management of opioid dependence may require development of new skills and knowledge by prescribers.

The factors that influence future requirements include opportunities for advancement within the organisation and succession planning needs (Murray, 1991). Succession planning is a method of assessing and fulfilling future staff needs. It includes designing strategies to ensure sufficient numbers of skilled and experienced employees to replace those that move on. This means acknowledging and predicting the likelihood that staff will seek opportunities elsewhere, identifying how many senior workers are near retirement (Lindenberger and Zachary, 1999) and determining the pool of employees required for the future. A mentoring program may be required if current professional development and recruitment practices are unlikely to produce the required number of people with the desired skills. A recent survey of AOD services in Australia indicates that staff recruitment and retention are a major concern in the field (Pitts, 2001). Mentoring may address some of the reasons given for these difficulties, such as lack of qualified staff, lack of resources and limited scope to advance.

As with any change within an organisation, the likelihood of success is significantly influenced by the organisation's culture. It is therefore imperative that culture is assessed before implementing a mentoring program. The type of organisational culture likely to support a mentoring program is described in the Key Factors section. In short, the organisation will ideally already be committed to developing and promoting people from within by investing in current employees rather than purchasing talent (Murray, 1991). Examples of how this is evidenced include provision of time and opportunities to attend training and opportunity for advancement. If the organisational culture does not possess those characteristics, it is unwise to implement a mentoring program. While it is important for the organisation to have a culture that supports mentoring, this may not be sufficient. A mentoring program designed in line with idiosyncratic aspects of the organisation's culture will have a greater likelihood of success (Lindenberger and Zachary, 1999).

Organisational support is a vital cultural aspect necessary for the success of a mentoring program, particularly support from senior management (Murray, 1991). This is enhanced if the senior management support is ongoing, frequent and visible (Geiger-DuMond and Boyle, 1995). This can be evidenced verbally or through inclusion in documents that espouse the organisation's values, such as the strategic plan (Geiger-DuMond and Boyle, 1995). Other organisational members are more likely to accept a mentoring program if it is advocated by upper management (Murray, 1991). If support is insufficient, assess how it can be developed (Lindenberger and Zachary, 1999). If commitment to professional development activities is not ingrained, especially in the upper organisational hierarchy, a mentoring program may not be wise (Murray, 1991).

While a commitment to professional development suggests a mentoring program may be viable, it needs to be consistent with current activities (Murray, 1991). The role of the mentoring program is to enhance, not compete with these other activities. This is also true for pre-existing informal mentoring relationships. Formal programs should

not replace these relationships, but instead support them, and give them additional legitimacy and credibility (Lindenberger and Zachary, 1999).

Significant resources are required to implement, set up and maintain an effective mentoring program. Both human and financial resources are required to establish, design, promote, implement and evaluate the mentoring program and support participants. In addition, maintenance of the program requires resources and staff, as well as sufficient participants (Murray, 1991). Sustainability of voluntary participation is an important consideration as this contributes to enthusiasm and commitment. Availability of mentors is also paramount. Depending on the objectives of the program, it may be necessary to ensure enough mentors to enable one-to-one mentoring, skipped-level mentoring (that is mentors who are two or more levels higher than their protégé) or cross functional mentoring (the mentor and protégé work in different sections, departments or disciplines).

Preparation

The preparation stage is about defining goals and objectives, collecting information and devising structures (Fowler, 1998; Lindenberger and Zachary, 1999). Before anything else, it is useful to create an advisory team for the program (Lindenberger and Zachary, 1999). The advisory team will be involved in guiding program development, including setting goals and objectives and developing policies and procedures (Murray, 1991). Team members are also valuable

Preparation

· **define goals and objectives**
· **form advisory team**
· **consult with all parties concerned**
· **establish administrative structures**
· **recruit program coordinator**

promoters and supporters of the program (Lindenberger and Zachary, 1999). A diverse membership is crucial, representing a cross-section of the organisation in terms of department, role, experience, seniority, age, gender and values (Lindenberger and Zachary, 1999). This diversity will bring a broad range of knowledge and a variety of perspectives to the group to help meet the needs of all organisational members, and identify potential problems (Murray, 1991).

Together the advisory team gathers information to inform program development. This includes collecting and discussing information about mentoring, such as researching books and articles on mentoring and benchmarking practices of other successful mentoring programs (Lindenberger and Zachary, 1999). Other organisational members are another valuable source of information. Consultation with all parties concerned is imperative. Without consultation, there may be resistance to the program when it is implemented (Murray, 1991).

Another aspect of the preparation stage is developing administrative systems to implement and evaluate the program (Freeman, 1997). A significant part of this is appointment of a program coordinator. There may be one or more coordinators depending on the scale of the mentoring program. While the advisory team continues to play a role in implementation and evaluation, it is the program coordinator that undertakes the majority of the workload between team meetings (Lindenberger and Zachary, 1999).

The role of the coordinator is broad and varied, but essentially, this is the person who is responsible for making things happen. The advisory team does just what their name suggests – they advise the coordinator. For example, the coordinator may propose a design for the program, based in part on advice and feedback from the team.

Implementation

1.   Promotion

A critical step in implementing a mentoring program is promotion and marketing. The major objectives of promotion are to inform the desired target audience and to create motivation for the program within that group. The first step of promotion is to develop a strategic marketing plan, which includes defining the target audience, methods of promotion and content of promotional material and activities (Lindenberger and Zachary, 1999). The target audience includes mentors and protégés, as well as others who will support and further promote the program. The objectives and scope of the program will inform decisions regarding the target protégés.

Promotion

- **develop a strategic marketing plan**
- **produce motivational and informative promotional material**
- **distribute verbal, written and electronic promotion**

Common forms of promotion are verbal, written and electronic. Word of mouth can be a powerful form of promotion (Murray, 1991), particularly when championed by those who feel passionately about the program. Those who are outgoing and influential are particularly valuable champions. Word of mouth can also be enhanced by briefing meetings or scheduled discussions in various departments or locations (Lindenberger and Zachary, 1999). Written marketing tools include leaflets, advertisements or editorials in newletters, bulletins or other print media, and reports such as management reports (Murray, 1991). Promotion can be achieved electronically through email, for example, posting an email on a list-server or by emailing people who have the potential to pass on the information to many others. Information about the program can be included on the organisation or departmental website. Linking this website to other related sites broadens the potential audience.

Effective promotional materials and activities are both motivational and informative (Murray, 1991). Motivational information includes benefits such as rewards associated with participation, positive outcomes or guarantees (Lindenberger and Zachary, 1999), and endorsement of the program by influential people (Murray, 1991). Participation in mentoring may also be recognised through annual awards at key conferences. Informative promotional materials will include the rationale for the program, how to become involved, criteria for participation, policies and frequently asked questions (Lindenberger and Zachary, 1999; Murray, 1991).

2.   Recruitment Strategies

Progressive recruitment is advisable when implementing a new mentoring program. This means beginning by recruiting a small number of participants from areas or groups where support or participation are most likely. Numbers can be gradually increased from other areas or groups where support and participation are expected (Lindenberger and Zachary, 1999). In addition, programs that produce positive outcomes increase the likelihood of support and participation through word of mouth.

Strategies to recruit participants include self nomination (that is, volunteering) and nomination by others (Murray, 1991). Regardless of

> **Recruitment**
>
> · **use progressive recruitment**
> · **include both self nomination and nomination by supervisors, sponsors, staff, and senior management**
> · **provide clear nomination criteria and form**
> · **select mentors and protégés through information on nomination form and interview, discussions with others or known history**

the nomination process, voluntary participation is critical. A significant advantage of self-nomination for both mentors and protégés is that those who volunteer are more likely to be motivated. In addition, the very process of volunteering by protégés indicates their interest in self-directed growth. Those with well developed skills required for mentoring may not necessarily volunteer, but may be committed to the role if nominated. Some of those who may benefit most from being a mentor may also be unlikely to volunteer but may be flattered by the nomination.

If nomination by others is to be used, it is important to ensure that the marketing strategy includes promotion to potential nominators, such as supervisor nomination, as ideally the supervisor is knowledgeable of the abilities and potential of their staff. There is a risk that the supervisor is biased, is not fully aware of the protégé's strengths and weaknesses or is reluctant to nominate their own staff. Emphasis on the importance and benefits of professional development in promotional material, or personal contact

from the program coordinator can help minimise this risk. Sponsor nomination is another option, that is a worker can be nominated by anyone who has noticed the potential protégé's capacity and ability.

A range of people, including other staff members, senior management or their supervisor may nominate mentors. It is also useful to ask those accepted as protégés to nominate a number of potential mentors. Protégés may choose mentors from a pool of nominated mentors. Alternatively, they may nominate anyone in the organisation who they believe is appropriate.

For both mentor and protégé nominations, it is important to provide a list of clearly stated criteria to the nominator, which could include items such as required and desired skills, knowledge and experience, personality characteristics, responsibilities, required commitment, expected outcomes and risks. These can be based on the characteristics of effective mentors and protégés described in the Key Factors section and any other specific requirements of the mentoring program.

Nomination criteria reduce the chance of nomination of those who are clearly unsuitable for the role. A clear, simple nomination or volunteer form which can further facilitate nomination includes information such as name, position, education and experience. Self-nomination forms may also request information such as what interested the person about the role, desired type of mentoring relationship and the amount of time they can commit to the relationship.

Information collected from nomination forms can guide selection of mentors and protégés. A primary consideration for selection is whether they possess the characteristics of an effective mentor or protégé. Other considerations include whether mentor skills are in demand or match the needs of particular protégé candidates. A greater depth and detail of information can also be obtained through an interview, discussions with others who know the candidate well and records of previous achievements and history.

3.   Matching Mentors and Protégés

Data collected in the recruitment and selection phases can also be used to match mentors with protégés. Key people such as co-workers or supervisors, or formal assessment, are also useful sources of infomation (Lindenberger and Zachary, 1999; Murray, 1991). Information to be considered includes the developmental needs of the protégé and the skills of the mentor. Style, personality, commitment and availability are also important (Murray, 1991). This information can inform tentative pairings or shortlisting, but it is the participants in the relationship who make the final decision (Scandura, 1998). Voluntary and self-initiated relationships mimic the formation of informal relationships and as such promote the likelihood of success (Lindenberger and Zachary, 1999).

Participants can make informed decisions based on summary information about potential partners and through the opportunity to meet and become acquainted (Geiger-DuMond and Boyle, 1995; Lindenberger and Zachary, 1999). Programs will differ in the extent and method of presenting information about potential mentoring partners to the participants. Smaller programs generally require less input by the coordinator as the participants may already be familiar with potential mentoring partners. The level of intimacy within the organisational culture can also have an effect. Both the background work done by the coordinator and the choices made by the participants are crucial. Mismatches or involuntary matching may result in a dysfunctional relationship or discontent, anger and resentment (Burke and McKeen, 1989 cited by Scandura, 1998).

Matching and Selection of Participants

- **use data collected in recruitment and selection phases**
- **collect further information through input from key people or formal assessment**
- **consider developmental needs of protégé, skills of the mentor, and style, commitment and availability of both**
- **ensure participant input**
- **consider gender and ethnic background**

Gender is worth special comment in relation to matching. Mixed gender mentoring relationships have both advantages and disadvantages. A male mentor may be an advantage for a female protégé, particularly in organisations dominated by men, as it may raise her profile, visibility and legitimacy (Fowler, 1998). Similarly, matching a female mentor with a male protégé can help to break down gender-based stereotypes (Fowler, 1998). These benefits may also apply to mentorships of mixed ethnicity.

The main concern about mixed gender mentorships is the potential for romantic or sexual interaction between partners, which is heightened by the often close, personal nature of a mentoring relationship (Murray, 1991). This may range from speculation by outsiders, actual involvement or sexual harassment. Gossip is a particular threat when an older male mentors a younger female (Fowler, 1998). The likelihood of these problems occurring can be addressed by providing specific guidelines to the mentoring pair in this regard. This includes acknowledging the potential for sexual attraction, discussing the program or organisation's relevant policy and identifying the potential outcomes of such an interaction (Murray, 1991). Decisions regarding mixed-gender mentoring will depend on circumstances, such as prevailing attitudes within the organisation and the specific needs of the participants.

4.   Preparing Participants

Before entering into the mentoring relationships, both mentors and protégés need to be prepared. This includes orientation, training and clarification of the involvement of other key people, such as the program coordinator and the protégé's supervisor.

4.1   Orientation

The primary purpose of orientation is to clarify expectations regarding objectives of the mentoring program, the nature of the mentoring relationship and the mentoring process (Fowler, 1998). Topics also include roles and responsibilities, anticipated outcomes and the role of others involved in or affected by the relationship (Kaye and Jacobson, 1995). Other information includes the duration of the mentoring program and processes for terminating relationships (Murray, 1991). Some information is specific to mentors, such as encouraging them to utilise the relationship as an opportunity to learn and contribute to their own development (Fowler, 1998). Protégés may benefit from a separate session where they can express any

> **Orientation**
>
> · **Clarify**
>   · **nature of mentoring relationship and process**
>   · **roles and responsibilities of mentor and protégé**
>   · **anticipated outcome**
>   · **role of others**
>   · **duration of program**
>   · **processe for terminating the relationship**
> · **Provide orientation for protégés, mentors and the protégé's supervisor**

concerns and network with each other (Geiger-DuMond and Boyle, 1995). It may be useful to have a single orientation session for all participants, separate sessions for mentors and protégés, or both. Inclusion of other interested parties in the orientation is also useful, notably the protégé's supervisor. As with mentors and protégés, protégé supervisors may benefit from attending both a group session and one catering specifically for them.

4.2   Training

Provision of training for both mentors and protégés prior to entering the mentoring relationship will help overcome potential difficulties in the relationship, ensure the mentor is well equipped to help the protégé, and ensure that both parties benefit from the relationship (Fowler, 1998). Without training, there may be confusion, lack of confidence and dysfunctional relationships (Moore, 1992). In some circumstances, it may also be appropriate to provide ongoing training throughout the program. In others, it may be excessive. Whether ongoing training is undertaken depends on

available time, other obligations of participants and needs. Providing a mentoring manual for both parties is another useful tool to support learning.

It is necessary for mentors and protégés to attend separate training sessions due to their different roles and learning requirements. Content is similar, but it differs in terms of specifics. This includes information about learning, such as adult learning principles, the learning process and how to establish learning goals (Lindenberger and Zachary, 1999). Another valuable topic is development and maintenance of the relationship, including establishing trust, communicating, and initiating and negotiating the relationship (Lindenberger and Zachary, 1999). More concrete subjects include defining roles and responsibilities (Lindenberger and Zachary, 1999), and skill training focused on both general skills and addressing specific needs. It is vital that learning outcomes are established at the outset of training (Lindenberger and Zachary, 1999) and that the training is based on adult learning principles, interactivity and practical activities, such as role plays (Forrest, Turban and Dougherty, 1996 cited by Allen and Poteet, 1999).

Training

- **Purpose**
    - **overcome potential difficulties**
    - **ensure both parties are equipped and get the most out of the relationship**

- **Establish clear objectives of training at outset**

- **Content**
    - **information about learning**
    - **development and maintenance of relationship**
    - **defining roles and responsibilities**
    - **skill training**

- **Delivery**
    - **adult learning principles**
    - **interactivity**
    - **practical activities**

5.   Negotiating an Agreement

It is advisable for the mentor and protégé to negotiate an agreement before commencing their mentoring relationship This would normally follow the orientation and training. Murray (1991) offers suggestions on how to negotiate this agreement, and identifies that this process may also involve the program coordinator and the protégé's supervisor.

The role of the coordinator during this stage is to guide and ensure that the needs of each of the parties are met. The first step is to establish the role of the mentor, which may be loosely structured or quite specific. This will help to focus the agreement.

The next is to clarify the protégé's goals, which are associated with the protégé's expectations. This may result in a quite extensive development plan for the protégé. In other situations, however, it may be a brief overview with further, more detailed discussions organised for the first official meeting between mentor and protégé.

Negotiating a Mentoring Agreement

- **establish role of mentor**
- **clarify protégé's goals**
- **discuss functional aspects of the relationship**
- **plan for conclusion of the relationship**

The agreement also needs to include functional aspects of the relationship, such as confidentiality, duration, termination, frequency and types of meetings, and any guarantees, such as time commitment or opportunities provided by the mentor. Discussions about confidentiality include the type of information to be kept confidential and how sensitive issues will be handled. The duration of the relationship will be determined by negotiated developmental goals and plans. Issues regarding termination of the relationship require discussion, including clarification that either the mentor or protégé can end the relationship (Scandura, 1998). This may include agreeing to examine the relationship periodically to determine its effectiveness. Frequency and types of meetings will usually be based on planned developmental activities and structures. Telephone or written contact may be considered as options when the two parties are separated by geographical distance or have limited time. It is important that any guarantees offered by the mentor to the protégé, such as time commitment or promotions, are discussed.

Evaluation

The most obvious reason for evaluating a mentoring program is to assess how well the program is functioning, including identifying whether stated aims and objectives are being met and determining the costs of the program. A less obvious reason is that the results of evaluation can increase support for the program. Positive findings can be used as evidence to procure continued or further funding for the program by convincing decision makers that it is a valuable and viable investment. Promotion of the program and commitment from organisational members can also be gained from the process (Murray, 1991).

It is important to design evaluation at the outset to prevent the risks of collecting contaminated data (Murray, 1991). An appropriate design may be quasi-experimental. This may involve pre- and post-test comparisons of participants and/or comparison with other developmental strategies (Ritchie, 1999). The aims and objectives of the program, as well as the purpose of evaluation, will inform the type of evaluation

strategies, method of data collection and measurement variables (Murray, 1991). To increase the quality, reliability and relevance of findings, both continuous, ongoing evaluation and inclusion of a variety of measures are recommended (Murray, 1991).

There is a variety of evaluation strategies which can be employed. These include assessing the costs and cost effectiveness, conducting a cost-benefit analysis and gauging the value to the organisation. Measurement variables may include protégé progress, mentor experience, turnover rate in the target group, and costs of training, development, administration and other items (Murray, 1991). Aspects of protégé or mentor experience may include job satisfaction, organisational commitment, stress, self esteem and behaviour (Seibert, 1999). Information may be obtained by a variety of methods, such as surveys, interviews and formal assessment instruments (Allen and Poteet, 1999; Geiger-DuMond and Boyle, 1995; Lindenberger and Zachary, 1999; Murray, 1991). Box 4 describes some assessment tools for formally measuring specific outcome variables. Information may be collected at the outset and through ongoing reports to the coordinator, then stored in a password protected or confidential database.

It is important to consider the difficulties associated with evaluating mentoring when both designing the evaluation strategy and reporting findings. It is difficult to accurately assess outcomes from mentoring due

Evaluation of Mentoring Program

- **Purpose**
  - **assess effectiveness of program**
  - **promote and support program**

- **Implementation**
  - **design at outset**
  - **continuous and ongoing**
  - **match evaluation with objectives**

- **Variables**
  - **protégé progress**
  - **mentor experience**
  - **turnover rate**
  - **costs of training, development and administration**
  - **job satisfaction**
  - **organisational commitment**
  - **stress**
  - **self esteem**

- **Methods / Tools**
  - **surveys**
  - **interviews**
  - **formal assessment instruments**

- **Difficulties in Evaluation**
  - **confidential nature of relationship**
  - **long term focus**
  - **difficulty controlling for other variables**
  - **limited objectivity**

to the confidential and elusive nature of the relationship and the focus on long term development (McBain, 1998). It may also be difficult to control for other variables, such as the impact of other experience and professional development activities of the protégé. Both the protégé and the mentor interact with other components of the organisation, as well as many that are outside the organisation. This makes it difficult to isolate a single factor, the mentoring relationship, or even to sum up a number of factors (McBain, 1998; Murray, 1991). In addition, it is difficult to measure mentoring objectively. Consequently it is more appropriate to focus on subjective factors, including satisfaction of participants and process issues, such as whether practical details of the program are correct (IDS, 1996 cited by McBain, 1998).

Box 4: Examples of Assessment Tools to Evaluate Outcome Variables

Job Satisfaction

- measured using Job in General scale of the Job Descriptive Index (JDI; Smith et al., 1987a; Smith et al., 1987b)
- one of the most widely used measures of job satisfaction
- 24 items
- answers scored on a four point scale (0=No, 3=Yes)

Organisational Commitment

- measured using Organizational Commitment Questionnaire (OCQ: Porter and Smith, 1970; Porter, Steers, Mowday and Boulian, 1974)
- 15 items
- views employee commitment as an affective attachment to the organisation characterised by shared valued, a desire to remain in the organisation and willingness to exert effort on its behalf
- answers are scored on a seven point scale (1=strongly disagree to 7=strongly agree) and averaged to form a score for each respondent

Work Role Stress

- measured using a scale developed by Kahn, Wolfe, Quinn, Snoek, and Rosenthal (1964)
- 9 items
- respondents indicate how frequently they feel bothered about named features of work (eg not knowing just what the people you work with expect of you)
- scores are averaged across the nine items, with high scores indicating more stress

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Encouraging Informal Mentoring

Many of the principles of organising a formal mentoring program can be utilised to encourage development of informal mentoring relationships. As mentioned earlier, some research suggests that informal mentoring is more effective than mentoring which occurs within a formal mentoring program. This suggests that encouraging informal mentoring can be beneficial for an organisation, professional body or the AOD field in general. This may require a cultural shift towards valuing mentoring.

While it may be difficult to change culture, systems and policies can have a significant effect. Reward systems can exert a powerful influence on behaviour (Kram, 1985). Recognition of participation in a mentoring relationship, through performance appraisals, decisions regarding salary, promotion or job reclassification, can act as a powerful reward (Ragins, 1997 cited by McBain, 1998). Other financial rewards may be bonuses, financial support for conference attendance or paid time off. Non-financial rewards include recognition in organisational publications such as newsletters,

certificates, annual awards or gifts such as tickets for entertainment events (Murray, 1991). Reference to mentoring in strategic plans, work practice guidelines, job descriptions and selection criteria is another potential tool (Kram, 1985). For example, the job description of managers and supervisors may include mentoring activities for their staff (Bell, 2000). The term mentoring need not necessarily be mentioned as long as specific activities are outlined, such as providing feedback, helping to set developmental goals, helping to network etc. Experience in these kinds of activities may be included in selection criteria for management positions.

Education and training will play a pivotal role in ensuring these changes produce the desired results (Kram, 1985). Workers with significant AOD experience may be trained in mentoring skills. Training in the self management model of mentoring or in networking skills may help those with less experience to obtain a mentor. Without appropriate education and training about mentoring, workers may merely pay lip service to job descriptions or misunderstand the intent behind such policies.

Identification of barriers to development of mentoring relationships is vital. It is important to identify and address both individual and organisational barriers (Kram, 1985). Time limitations can present a significant barrier. Workers are unlikely to engage in mentoring activities if they only have sufficient time to complete their daily tasks. Supervisors

Encouraging Informal Mentoring

Support or influence a culture supportive of mentoring and AOD work through:

· **reward systems, both financial and non financial**

· **reference to mentoring in policies and guidelines**

· **providing education and training:**

   · **mentoring skills**
   · **attracting a mentor**

· **identifying barriers such as:**

   · **time limitations**
   · **fear of losing good worker**

· **creating opportunities:**

   · **provide time and space**
   · **run networking events and groups**
   · **encourage attendance at workshops and seminars**
   · **utilise technology**

are likely to be reluctant to let subordinates spend time with a mentor if deadlines are delayed. Fear of losing a good employee may also be a barrier. A supervisor may be wary of mentoring their staff for fear that the protégé will grow beyond their current position and the supervisor will then have to find another promising employee.

As well as identifying barriers, it is important to create opportunities for mentoring relationships to flourish. A relatively simple way to provide such opportunities is to create time and space in the workplace for discussions. This may include providing a lunch room or another dedicated meeting space. Time for such relationships may be accomplished by regularly setting aside time for staff interaction, for example, a weekly lunch or daily tea break. Networking events create good opportunity for organisational members to meet and develop relationships with others who they may normally not encounter (Linney, 1999). Another way of doing this is to establish groups that meet regularly, providing less experienced workers with the opportunity to interact frequently with more experienced colleagues. Increased opportunities for interaction can also be encouraged by subsidising staff attendance at workshops and seminars. This may encourage exchange of ideas and the possibility of meeting a potential mentor or protégé (Coombe, 1995). Use of technology can also create opportunities, such as a mentoring website where people can engage in online discussions or cyberforums or register their interest in participating in a mentoring relationship (Linney, 1999). A telephone advisory service may be another useful tool for providing access to someone with useful AOD knowledge and experience (Linney, 1999).

In addition, given the diversity of workers in the AOD field, it is important to nurture a culture that values AOD related work as an important part of the human services worker role. The strategies for achieving this are the same as those for encouraging mentoring. These may include reference to AOD in policies and official documents (such as strategic plans, job descriptions, selection criteria) and rewarding workers for AOD work (for example, through awards, job classification, special mention and conference attendance).

Guidelines: Mentor

Has someone asked you to become their mentor? Are you considering looking for someone to mentor, perhaps to rejuvenate your interest and vitality at work? Do you think you are already engaged in an informal mentoring relationship and would like to make sure you are helping the other person to the best of your ability? If you have answered yes to any of the above questions, this section is relevant to you.

To Mentor or Not to Mentor

Before engaging in a mentoring relationship, it is important to ask yourself whether you think you are suited to the mentoring role. Key considerations include your skills, level of commitment you are able to give to the protégé, and compatibility between you and the protégé. The Key Components section outlines the criteria for mentors. You can also assess your suitability as a mentor by compiling two lists. The first is a list of the needs of a potential protégé. The second is a list of your resources (skills, abilities and knowledge) and what you are

Assess Suitability for Mentor Role

- **skills**
- **commitment**
- **compatability**
- **seek support through training, research or a mentor's forum**

willing to give to the relationship (commitment of time and attention). Once complete, review the two lists and match resources to needs. Identify needs you can meet easily, those requiring more effort and greater commitment and those which may be better met by someone else. The greater the degree of match between resources and needs lists, the more likely it is that the relationship will be productive. Other considerations include potential for the relationship to cause difficulties in other interpersonal relationships and any potential consequences (both negative and positive) of participating in the relationship.

In practice, a careful, considered decision about whether to become a mentor might not be possible. This is frequently the case in traditional mentoring relationships that begin informally. The relationship may develop without either party ever calling it "mentoring" (Stone, 1999). The above suggestions may still be useful in this situation, however, as they can help a mentor to assess their role in the relationship and target areas for improvement.

At this stage, it is also worth seeking support by attending mentor training, undertaking some research about mentoring and the role of the mentor or joining a mentor's forum. The internet is a valuable tool in locating this type of information. There are numerous websites dedicated to mentoring, where you can locate training packages, manuals, mentor forums or simply find further information.

You may have a specific desire to mentor someone in particular. The reasons for this vary considerably, ranging from helping someone with an interest in AOD work or a need for fresh ideas (Stone, 1999). If, after careful consideration, you are prepared to offer your time and commitment to that person, a simple way to start the relationship is to offer to help the individual on a regular basis. This offer may be made, for example, when the person asks for help for a specific reason (Stone, 1999).

Beginning the Relationship

Preparing for the Protégé

The cornerstone of a successful mentoring relationship is sufficient preparation, providing a firm foundation on which to build the relationship. A vital part of this preparation is organising both your time and space, that is, to plan the time you will spend with the protégé and the location for your meetings. The location may be your office, the protégé's office, or a local coffee shop – whatever seems most appropriate. Other space considerations include comfort, privacy and accessibility for both you and the protégé. Planning time and space also communicates to the protégé the importance you place on the relationship. Obtaining background information about the protégé is another crucial part of preparation. This may include their educational and work history, experience in AOD work, areas of strength and weakness, and interests. The extent and type of background information depends on the circumstances, including what is available and how much you would rather obtain from the protégé.

> **Beginning the Relationship**
>
> - **prepare time and space**
> - **assess background information about protégé**
> - **clarify expectations, negotiate an agreement and set limits**
> - **undertake a needs assessement**
> - **set personal, professional and/or educational goals**
> - **establish developmental plan**

The First Few Meetings

The first few meetings with the protégé can contribute greatly to the quality of the relationship. This is the Initiation Stage, as discussed in the Mentoring Lifecycle section. Neglect during this critical period leaves the relationship open to the risk of becoming dysfunctional. There are a number of important issues to be addressed at this time. These include clarifying expectations, negotiating agreements and setting limits. A partnership approach is crucial while discussing these issues. This sets the

scene for the entire relationship as a partnership and helps to equalise power relations, develop rapport, foster acceptance and safety and strengthen the self-direction and independence of the protégé. Partnership helps to avoid another common mentoring pitfall – over-dependence of the protégé on the mentor.

Most of the first meeting, and possibly the first few, will be devoted to addressing the above issues and establishing rapport with the protégé. It is important not to rush this crucial period. It is also beneficial to have planning discussions during the first meeting. This will be determined by circumstances, such as previous acquaintance with the protégé or time availability. The time taken to plan varies between relationships and is revisited regularly throughout the relationship.

The extent of planning between you and the protégé depends on factors such as the intensity and intent of the relationship and the expressed wishes of the protégé. As an example, it is probably not productive to force a protégé to commit to a developmental plan if they see you as someone to provide advice, feedback and support on an as needs basis. It is not your responsibility to tell the protégé what it is they need. A domineering approach may result in resentment or overdependence from the protege. The more informal the relationship, probably the less formal the planning process.

Assessment

The first stage of the planning process is to assess skills, knowledge and interests, and diagnose needs. Needs assessment may be either formal or informal. Informal assessment is based on the protégé's opinion following discussions between the two of you. Formal assessment can be undertaken through the use of formal assessment instruments (Box 4 describes a number of assessment tools which may be used for diagnosing the protégé's developmental needs, taken from Murray (1991)).

Goals and Objectives

Following identification of skills, knowledge, interests and needs, you can work with the protégé to help them set goals and objectives. These may be professional, educational or personal (Murray, 1991) and both short and long term. Of course, this depends on the initial purpose of the relationship. In some cases, goal setting may occur first and the needs assessment based on the identified goals. Objectives are set which act as stepping stones to the long term goals of the protege.

At this stage, you might encourage and help the protégé to create a written developmental plan based on their goals. Progress towards goals is based primarily on the protégé's available time and in conjunction with their usual work responsibilities. If there is considerable overlap between usual duties and mentoring, it is useful to include the protégé's supervisor in some way to ensure there are no conflicts. Each

identified goal is addressed separately in the development plan. Issues to be addressed include:

- planned date for attainment of goal
- description of the goal in terms of outcome (not the process used to reach the goal)
- list of detailed, sequential steps for achieving the goal
- target dates for completion of each step
- list of resources required, including people, places, funds and other items.

It is valuable for the protégé to keep a written record of their progress against these goals. This helps to reinforce their schedule, prepare them for discussion with you and ensure goals are revisited regularly.

During the Relationship

As the mentoring relationship develops, it will be necessary to adopt a new range of behaviours in addition to those used in the Initiation Phase. Once you are both comfortable and have developed plans, the relationship moves into the peak period, often called the Protégé or Cultivation Phase.

Understanding Learning

One of your key roles is to help the protégé to learn. As such, you need a firm understanding of how to help someone learn. There are many differences between people in the way they learn, but there are still general principles to guide the mentor. The mix of support and challenge varies depending on the learner,

During the Relationship

- **understand learning**
- **provide appropriate support and challenge**
- **reinforce effective behaviours**
- **use communication and active listening**
- **provide practical experience**
- **regularly assess relationship to avoid pitfalls**

their personality and their stage of development (McNally and Martin, 1998). For example, greater support is required from the mentor if the protégé has limited ability, commitment and lacks a clear purpose. Less support, but greater challenge, is required if the protégé is highly motivated and purposeful. It is quite common for a mentor to be comfortable supporting the protégé, but somewhat uncomfortable with the challenge role. However, challenge is not meant to be confronting. It may simply involve the use of questions to encourage critical reflection by the protégé. This can occur during a meeting where the purpose is to review and evaluate progress.

Reinforcement

Other key aspects of effective learning include reinforcement of desired behaviours or accomplishments and encouraging reduced dependence and increased autonomy. Regardless of how the protégé learns, it is important to remain patient and persevere (Caravalho and Maus, 1996). The quality of the relationship between teacher and learner is another key aspect of learning. As such, it is important to evaluate the relationship at regular intervals.

Communication and Active Listening

Communication is vital for both learning and sustaining relationships. The way in which a mentor communicates may reveal their level of respect and adherence to confidentiality (Caravalho and Maus, 1996). Three vital components of communication in mentoring are active listening, constructive feedback and discussion.

Active listening encompasses listening, body language and responding. The body language of active listening involves nodding, facing the speaker squarely, eye contact and leaning towards the speaker (Stone, 1999). It is important to respond to the speaker with smiles and verbal responses, such as paraphrasing what the speaker has said to ensure you have understood them correctly (Stone, 1999).

A key to starting a productive discussion is to begin with a statement that gives the discussion direction, rather than starting with a question as this may induce defensiveness in the protégé (Stone, 1999). Feedback is more effective than advice, particularly if unsolicited (Stone, 1999). Advice can create resentment in the recipient. Feedback also needs to be framed appropriately to avoid resentment. The key is not to tell the protégé what to do, or what you would do in their situation. Instead, encourage the protégé to think about their options so that they can reach their own conclusions. This can be done by using the Socratic Method, that is, by listening and asking open-ended questions (Edwards, Kennedy, and Kennedy, 1993). In addition, instead of simply answering the protégé's questions, it can be useful to encourage them to think about the situation in greater detail and generate their own solutions (Stone, 1999). This way, the protégé knows that they would have found a solution to the problem on their own, but the mentor helped them reach this point sooner. It is important that feedback is clear, empathic and honest (Stone, 1999). Encourage the protégé to engage in critical reflection through discussion and feedback. This acts as a catalyst to develop autonomy and self-learning in the protégé (Barnett, 1995).

One of the most important ingredients in learning is practical experience. People learn well from their own mistakes (Caravalho and Maus, 1996), so it is crucial that the protégé is free to do things their way. Look beyond reservations about the protégé's mistakes and focus on providing support to the protégé when needed and commend them for their efforts. Patience and perseverance are essential. A negative reaction to the protégé's mistakes may make the protégé afraid of taking risks with a consequent reduction in their initiative and independence (Caravalho and Maus, 1996). Other practical activities include observing the protégé and providing feedback or involving the protégé in your activities. This gives them the opportunity to learn through observation (Caravalho and Maus, 1996). It is important for them to observe both positive and negative situations. As an observer, they have the opportunity to hear what is said, sense emotional overtones and watch reactions. Later, during mentoring discussions, the protégé can learn about the strategies used in the situation. Providing information about opportunities, such as the chance to work on a particular project or a promising job vacancy, will also increase the protégé's experience (Geiger-DuMond and Boyle, 1995).

Avoiding Pitfalls

Continually seeking feedback from the protégé may avoid many of the pitfalls of mentoring. Issues to be addressed include whether the protégé's needs are being met, how the relationship can be improved, reaching and setting goals, any problems, and whether the protégé needs any help external to the mentor (Stone, 1999). Stone (1999) suggests a number of questions the mentor may ask the protégé. These are listed in Box 5.

Moving On

Inevitably, the mentoring relationship will reach a stage where it is time to move on. A common reason for this is that the protégé has outgrown the mentor and has needs that cannot be met by the current mentor. Ignoring this problem may result in dissatisfaction in the protégé, potentially souring the mentoring relationship. If the mentor is linked to the protégé's

Moving On

- **know when relationship has run its course**
- **create path for initiation by either protégé or mentor**
- **discuss reasons**
- **keep in touch**

employment, the organisation may lose a valuable employee if the protégé looks to other organisations for their mentoring needs (Stone, 1999). Another cause for terminating the relationship may be that it is inhibiting, rather than supporting, the

protégé's development (Stone, 1999). This may occur, for example, if the protégé becomes over-dependent on the mentor. The result may be that the protégé relies heavily on the mentor instead of trying to solve their own problems or develop their own contacts. The relationship may also inhibit the protégé's development if the protégé gives it preference over other important relationships or duties. In a fixed period mentorship, such as a mentor helping a protégé on a specific project, it may simply be that the period has expired. Personality conflicts or an inappropriate personality for the role may also result in termination of a mentoring relationship (Stone, 1999).

Either the mentor or the protégé is free to end the relationship when appropriate (Stone, 1999). This stage of the relationship is important and there are techniques to manage this phase, particularly if the reason is that the protégé has outgrown the relationship (Stone, 1999). Explaining the reasons for ending the relationship will help minimise any misunderstanding or bad feelings (Stone, 1999). Misunderstandings can cause problems, for example, feeling responsible for a failed relationship may impact heavily on their performance and motivation. Helping the protégé to find or prepare for a new mentor is useful (Stone, 1999). This may include recommending a particular mentor and pointing out specific developmental needs to be addressed by the new mentor. Finally, if appropriate, you can tell the protégé that your door is still open (Stone, 1999), perhaps for specific advice or a friendly chat between colleagues.

Box 5: Obtaining Feedback from the Protégé

- Are we addressing your needs?
- Do you feel a sense of satisfaction from the ongoing meetings?
- What could be done to improve our conversations?
- Do you feel that we are spending more time together than you now need?
- Are there some special issues that we should put on the table and address?
- Do you see the same need for my help as you did originally?
- If we have achieved our initial goals, what would be the next goals?
- Am I still the person to help you reach your next level of accomplishments?
- Is there someone else who would be a more appropriate mentor at this stage in your development?

Guidelines: Protégé

Attracting a Mentor

There are various paths to becoming a protégé in a mentoring relationship. It may be through volunteering or being assigned to a formal mentoring program at work. An informal relationship with a more experienced worker may develop into a mentoring relationship. A conscious decision may be made to seek out a mentor to help with career development. These paths differ in the degree to which the

Attracting a Mentor

- **be clear about own goals and objectives**
- **identify required characteristics of the potential mentor**
- **network**
- **communicate and self-promote**

potential protégé actively pursues a mentoring relationship. Despite this, a potential protégé can always take steps to improve their chances of finding a suitable mentoring relationship. These relate to clear objectives, communication and promotion.

Before seeking a mentor, it is important to be clear about your own goals and objectives (Caravalho and Maus, 1996). Think about the best way to achieve these. A mentor may not be the most suitable path. For example, it may be more appropriate to undertake formal study. Consideration of your own learning habits and personality is also important to determine whether you are the type of person likely to benefit from a mentoring relationship. These are described in the Key Factors section.

If you decide that mentoring is appropriate, the next step is to identify the skills, knowledge and characteristics required in the potential mentor (Caravalho and Maus, 1996). These may differ depending on your needs. A person who wants to develop technical knowledge will require a mentor with quite different skills than one who is looking to enlarge their network of contacts. In addition to identifying mentor traits to match your specific goals, it is also important to find a mentor who possesses the characteristics of an effective mentor (Allen and Poteet, 1999). These include interpersonal, teaching and management skills, commitment to the mentor role and a relevant and substantial knowledge base. In addition, keep in mind that their belief in your potential is paramount (Mentors' Forum, 2002). These are also described in greater detail in the Key Factors section. Finally, the oft-quoted "magic" ingredient of informal mentoring is more likely if the mentor and protégé share a special rapport and affinity for each other. As such, it is important to seek a mentor with whom you have, or may develop, such an important bond (Caravalho and Maus, 1996).

Finding a mentor is not just about single-mindedly seeking out a specific person to mentor you. As mentioned in earlier sections, many good mentoring relationships

just happen. This is where communication and promotion come in. It is important to make the most of all opportunities, whether they be one-off discussions with someone or something more long term. The key is to make connections with people. As such, it is vital to develop the ability to relate to a variety of people (Caravalho and Maus, 1996). Another is to project yourself as a person who is dedicated so that a prospective mentor will see your potential, this may convince them that it is worth investing their time and effort in your development (Linney, 1999). The ability to communicate and self-promote will be valuable in finding potential mentors. These skills will be beneficial at conferences, networking events, training courses, project meetings, even in the tea-room. Of course, it is also important to attend events and locations where you are likely to meet potential mentors. This means ascertaining where the type of person you seek is likely to be found and then being there yourself. Apart from real events, virtual events on the internet are also a good source. Your current network may be a useful starting point, either to find a potential mentor or to ask for advice or a referral to someone appropriate.

Approaching the Mentor

Before asking someone to be your mentor, it is worthwhile developing a proposal outlining how the relationship will benefit both you and mentor, and the reasons you chose them. This will help clarify your needs and objectives. More importantly, however, it will demonstrate to the mentor that their time will be well invested on the basis of the information it contains and as an illustration of your attitude and approach to the relationship.

> **Approaching the Mentor**
>
> - **develop a proposal outlining benefits for mentor**
> - **clarify your needs**
> - **don't be discouraged**

The amount of detail in the proposal and how you approach the mentor will depend on the person and your current relationship (Resh, 2002). Use your own judgement. You may approach them by simply asking them to be your mentor (Resh, 2002), scheduling a meeting time when you plan to ask them, writing a formal letter, or by asking an intermediary to sound out the potential mentor or to refer you (Mentors' Forum, 2002). Do not be discouraged if they decline (Resh, 2002). If you have the opportunity, however, it may be appropriate to ask for a referral to another more appropriate person. Keep looking until you find someone suitable.

You may be approached by someone else offering to be your mentor, particularly if you have been networking and putting out the word that you are looking for a mentor. They may have recognised your potential and want to help. However, ensure that you are certain of their motives and how they can benefit you before accepting (Mentors' Forum, 2002).

Preparation and The First Few Meetings

Prior to the first meeting, it is worthwhile preparing some information to clarify your thoughts and provide information to the mentor, such as:

- what you would like to achieve
- potential barriers within yourself to making the most of the relationship
- what you would like the mentor to provide
- your needs, particularly relating to time
- a brief biography

(Mentors' Peer Resources, 2002)

The first meeting is an appropriate time to negotiate an agreement with the mentor. The extent and formality of the agreement will depend upon you, the mentor and your relationship. An agreement will include information such as roles and expectations, goals and objectives, confidentiality, duration, termination, frequency and type of meetings and any guarantees. More comprehensive guidelines for negotiating an agreement are given in the Guidelines: Organisations section.

Making the Most Of It

The mentor may (or may not) be the source of all wisdom but it is up to you to actively extract the information that is important to you. Remember, the mentoring relationship is about achieving your goals, not those of the mentor. Being proactive is the key to getting the most out of it. This means accepting responsibility (Stone, 1999), being clear about your developmental needs (Geiger-DuMond and Boyle, 1995), and learning to consistently ask the mentor for feedback and alternative ideas (Caravalho and Maus, 1996). It is also important to create time to be with the mentor, to take the initiative in organising times and

Making the Most Of It

- be proactive
- accept responsibility
- be clear about goals
- ask for feedback
- seek out opportunities
- listen and respond to feedback

places to meet and to create opportunities by observing and participating in projects (Caravalho and Maus, 1996). Involvement in projects, whether large or small, provides opportunities to learn new skills through participation and the chance to observe how those with more skills undertake such tasks. Involvement in a project from start to finish is particularly valuable. To make the most of observational opportunities, it is important to practice listening and take and revisit notes (Caravalho and Maus, 1996).

Opportunities for observation can be created by keeping up-to-date with your mentor's activities and asking to be involved. In addition, it is to your advantage to ask others for input and opportunities rather than relying solely on your mentor (Caravalho and Maus, 1996).

While an active role is vital, it is equally important to be responsive to the mentor. Listening skills play a significant role (Geiger-DuMond and Boyle, 1995), as does the ability to accept and value feedback and resist the urge to become defensive if feedback is not positive or involves constructive criticism (Geiger-DuMond and Boyle, 1995; Stone, 1999). Welcome help from the mentor. Accept their assistance in identifying developmental needs, performance deficiencies, and setting goals and objectives (Stone, 1999). A sense of humour is beneficial. It is difficult to anticipate and control outcomes, but possible to control your own reactions. A sense of humour can make it easier to accept feedback, advice and setbacks (Caravalho and Maus, 1996).

The responsibility for developing the trust, mutual respect and discretion that characterises successful relationships is shared by you and your mentor. This includes maintaining confidentiality, ensuring the relationship does not become too personal, and resisting any desire to brag about your relationship with the mentor (Geiger-DuMond and Boyle, 1995).

Moving On

As the relationship progresses, your needs will most likely change, particularly as you achieve goals and set new ones. This requires ongoing assessment of the relationship to recognise if it is no longer productive. If you negotiated an agreement with the mentor before commencing the relationship, you will have probably agreed upon a process to review the relationship and to enable it to change, grow or end. It is normal for

> **Moving on**
>
> - **continually assess the relationship**
> - **develop process of review**
> - **keep in touch**

a mentoring relationship to reach a point where it can no longer continue as it started. This is likely to result in a transformation of the relationship, with it either to ceasing or continuing as a more collegial relationship. If you determine that the relationship has run its course, keep in touch with your mentor (if appropriate) because they may become a valuable colleague.

Where?

Where to from here? Future Directions

Future Directions

As stated in the Executive Summary, the initial aim of this monograph was to review the mentoring literature relevant to the AOD field. However, the search did not reveal anything specific to alcohol and other drugs. The focus shifted, therefore, to produce a primer for the AOD field outlining what mentoring is, why it is important for the field and how to engage in mentoring activities. The primer is informed by the mentoring literature of other disciplines and workforce development literature relevant to AOD. While it is recognised that both formal and informal mentoring do occur in the AOD field, the monograph does not attempt to speculate on this, nor is it meant to detail the mentoring needs of all the those workers who have the potential to respond to AOD issues. It is simply intended as a starting point. While writing the monograph, it became increasingly apparent that there was considerable potential for further research into mentoring for AOD workers.

Scoping the AOD Workforce

Given the dearth of literature in this area, a next logical step would be a scoping exercise to assess the extent and quality of mentoring currently occurring in the field. This relates to both mentoring relationships between AOD workers and the degree of AOD content in mentoring relationships for which AOD is not the core focus, such as preceptorships and internships in nursing, social work and medicine. Relevant mentoring activities to be assessed may include:

- formal mentoring programs
- informal relationships
- online mentoring programs and websites dedicated to the topic
- education or training that use mentoring as reinforcement or to enhance training transfer
- telephone services
- resources, such as mentoring manuals.

Another valuable component of a scoping exercise would be to determine the unique mentoring needs of various AOD workers, which are likely to differ vastly. Mentoring needs may differ according to the worker's:

- educational background
- experience
- sources of support
- access to technology
- time availability

- geographical limitations
- employer characteristics and goals.

The expected outcomes from a scoping exercise are that it would reveal areas of need and potential for mentoring by identifying:

- readiness within the field to accept mentoring
- characteristics of currently existing mentoring relationships
- degree of spontaneity or formality of mentoring relationships
- how and where mentoring relationships form in the field
- who is likely to be engaged in a mentoring relationship
- circumstances that encourage or inhibit mentoring
- methods of enhancing effectiveness of what is already occuring
- workers who may benefit from mentoring
- potential for mentoring to address the needs of various workers
- what works
- ability for workers to be pro-active in seeking out mentors.

Pilot Mentoring Scheme

Information about needs and potential effectiveness of mentoring could inform a pilot mentoring program. The nature or extent of such a pilot cannot be ascertained until the outcomes of the scoping exercise are available, but there are numerous possibilities. One is to develop a program to encourage workers to adopt the self-managed model of mentoring. This may include promoting the model, providing training, developing resources, and inclusion in policy documents, strategic plans or job descriptions. Another may focus on providing access to mentors for rural and remote workers, through development of online resources, training workers to use these resources and allocating funding to provide equipment.

Mentoring Website

Development of a mentoring website aimed specifically at the AOD workers has considerable potential to increase access to and encourage mentoring within the field. At the simplest level, the website may contain information about mentoring, such as that included in this monograph. However, the real power of such a resource is the potential to increase accessibility and interaction. The site could host a mentoring forum and listserve, thereby providing a virtual meeting place for mentors and protégés. In addition, it provides the opportunity for workers to feedback information about their needs.

For the Reader

It is hoped that readers of this monograph will use the information it contains to recognise, enhance and develop mentoring relationships. You are encouraged to think about your existing working relationships, and consider how they correspond with the description of mentoring provided or whether they have the potential to develop into mentoring relationships. For existing relationships, it is hoped that you will use this volume to enhance your interactions. It is also hoped that managers, funders and policy makers will use the suggestions given in this monograph to encourage mentoring relationships and think creatively about how mentoring can be used within and across organisations to enhance the functioning of the AOD workforce.

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