Administrative Guidelines

Mentoring for OCES

Goal: To provide for a professional, educational and personal support system for new educators of the Oklahoma Cooperative Extension Service.

Objectives

- Identify resources and resource persons for the mentee.
- Educate the mentee in organizational history, philosophy, goals, policies and values.
- Sharing the skills and knowledge of one or more experienced and successful Extension professionals to meet the needs of the mentee.
- Strengthening the mentee’s leadership skills and self-confidence.
- Fostering open communication and dialogue.
- Helping the mentee understand the Extension Educator position description and competencies contained there in.

By accomplishing these objectives, the mentee will experience an easier transition into the Oklahoma Cooperative Extension Service, thus accelerating the productivity of the mentee and enhancing the overall effectiveness of the Extension Service.

Mentoring Process Guidelines and Considerations

- Mentors are chosen through an application process and recommendations are made by the appropriate supervisor(s).
- Commitment to the formal mentoring relationship is one year.
- The mentor should contact the new mentee within the first week after the relationship has been announced/determined. The mentor should instruct the mentee to fill out the Mentee Needs Assessment and mail the completed needs assessment to the mentor prior to their first face-to-face meeting.
- A minimum of four face-to-face visits should occur between the mentor and mentee within the year. The first visit should be during the first month after the pairing is announced. The remaining three visits/meetings should be during the next nine months.
- Mentors and mentees should correspond frequently either by phone, e-mail, in person, etc. It is the responsibility of both participants to make sure that this communication occurs.
- “NO-FAULT” Arrangement: Throughout a professional career, all educators face various challenges and changing circumstances which are often unexpected and may make it difficult to continue being a mentor. This program operates with a NO-FAULT philosophy that allows mentors and mentees to request changes or reassignments without fear of repercussions. The mentor or mentee may request a change or release from the assignment by contacting the appropriate supervisor(s).
Qualifications of Mentors

- Commitment to the mission of the Oklahoma Cooperative Extension Service.
- Effective skills in program development, marketing and interpretation of Extension programs to diverse audiences.
- Appropriate subject matter expertise.
- Knowledge of policies and procedures of the Oklahoma Cooperative Extension Service.
- A minimum of five years of extension experience, and currently serves as an Extension Educator.
- Continued “Meets Expectations” or above performance appraisal rating.

Desirable Characteristics of Mentors

- Team player.
- Trustworthy, ethical, and professional behavior.
- Positive attitude and a sense of humor.
- Respected by peers; shows respect for others.
- Listens and communicates effectively.
- Recognizes and encourages excellence.
- Self-confident.
- Patient, encouraging, caring and sympathetic.
- Appreciates and encourages diversity.
- Flexible/adaptable; receptive to new ideas.

Mentor Application and Selection Procedure

- The Mentor’s Application Form (attachment 1) should be completed and returned to the Office of Staff and Program Development with a copy submitted to immediate supervisor(s).
- An applicant must attach a copy of his/her current curriculum vitae or resume and a completed copy of the Mentor/Mentee Biographical Sketch (attachment) to the application.
- Applicants, if selected, will be expected to participate in Mentor training.
- Applicants selected will serve as mentor for one year and will mentor only one new educator at a time.
- County Extension Directors, District Directors, and Assistant Directors will review mentor nominations and make recommendations of new mentors to the Staff and Program Development Director.

Mentor Training

The mentoring process can only be as successful as the training program for its participants. Mentors are selected based upon a set of characteristics and criteria that are deemed critical.
Training is, however, needed to ensure that the Mentor is equipped to train the mentee in areas that will be needed for his/her success.

Upon selection, Mentors will be trained in subject matter that will be critical to the success of the mentoring relationship. There will be an initial comprehensive training to address the policies and procedures and provide experiential learning to assist in the development of coaching skills. Update trainings will also be held periodically for mentors. The following outline lists possible topics to be included in the training program. Administrators, District Directors, County Extension Directors, Staff and Program Development Director, university faculty and others will be involved in conducting the training.

I. **Background**
   a. Information about OCES Mentoring Program.
   b. Historical background of mentoring concept.

II. **Role of Mentoring**
   a. Mutual benefits of mentoring
   b. Philosophy, mission and goals of OCES Mentoring Program

III. **Skills and Behavior of Mentors**
    a. Coaching skills
    b. Psychological support
    c. Facilitating learning
    d. Promoting
    e. Listening
    f. Sponsoring
    g. Counseling

IV. **Mentor or Supervisor-What is the Role**

V. **Conflict Management/Resolution-Striving for “Win/Win”**

VI. **Policy Issues**
    a. Update on forms, paperwork and reporting
    b. Educator/Specialist relationships
    c. Leave policies
    d. Organizational update

VII. **Benefits of Teamwork in Extension**

VIII. **Do’s and Don’ts for Mentors**

**Matching Process**

The appropriate supervisor(s), with input from the county staff, will determine the Mentor/Mentee match. Consideration for matching the mentor and mentee will include (where possible) similar programmatic responsibilities and geographic proximity. Copies of all mentoring information will be collected and maintained at the state level. This information will be used to evaluate the mentoring program.

The Mentee Needs Assessment (Attachment 2) will be filled out by the mentee and forwarded to the mentor during the mentee’s first few weeks on the job.
Mentor Guidelines

Research shows that the most successful mentoring relationships are those which are initiated as early as possible in the mentee’s tenure. In addition, a mutual commitment to meet regularly is important since success is related to time spent together.

The following suggestions should help the mentor begin the mentoring relationship:

- Write a letter of commitment to the assigned mentee (Attachment 3).
- Send the mentee a copy of your completed Mentor/Mentee Biographical Sketch (Attachment 2) and encourage him/her to send you a copy of his/her completed biographical sketch as well.
- Send copies of the letter and biographical sketches to the appropriate supervisor(s).
- Call the mentee to initiate the relationship and instruct the mentee to complete the Mentee Needs Assessment (Attachment 4) and mail it to you before your first formal face-to-face meeting.
- Get started early. Set up the first meeting within one month (or as soon as possible) of the mentor and mentee pairing announcement.
- Upon completion of the formal mentoring process, the mentor should complete the Mentoring Program Evaluation (Attachment 5) and submit it to the mentee’s supervisor and district director.

Suggestions for a Successful Mentoring Visit

Face-to-face visits will result in effective communication between the mentor and mentee. The visits will complement phone/e-mail contacts and offer an opportunity to focus more in-depth on issues identified by the mentee as being of highest priority. The completed Mentee Needs Assessment Attachment will serve as a guide for discussion topics appropriate for the face-to-face visit.

The following suggestions will help assure a productive and successful visit with the mentee:

- Schedule adequate time with minimal interruptions to foster a positive mentoring relationship.
- Provide directions to meeting location(s).
- Be ready and accessible for mentoring visit(s).
- Know what you want to accomplish to enhance the mentoring visit.
- Have information readily available for sharing.
- Allow time for an office tour and introduction of county staff. (Do this in either or both the mentee’s or the mentor’s office).
Responsibilities of the Mentor

Mentors should be prepared to devote time and energy to the relationship. The most important factor in mentoring is the mentor’s willingness to give time and attention to the mentee. You accept great responsibility in this close, trusting relationship. Pitfalls can be averted by honest, open communication that establishes ground rules and clarifies the concerns of the new mentee. Upon completion of the formal mentoring process, the mentor should complete the mentoring program evaluation and submit it to the mentee’s supervisor(s).

The following are some things the mentor should **DO** in the mentoring relationship:

**DO:**
- Review the Mentee Biographical Sketch to learn more about his/her interests and background.
- Take responsibility to initiate the relationship.
- Foster creativity and independence.
- Set aside time for the mentoring process and keep all appointments.
- Display professional behavior and dress.
- Schedule meetings and feedback sessions with planned topics.
- Be positive, enthusiastic and supportive.
- Be a good listener.
- Establish open and honest communication and a forum for idea exchange.
- Maintain confidentiality! If something concerning the mentor or mentee needs to be discussed with others, it should first be discussed within the mentoring relationship.
- Be flexible on meeting times and places.
- Be available to mentee when questions/concerns arise, as appropriate.
- Offer to share resources, expertise and experiences.
- Confer as needed with District Director or the County Director.
- Provide opportunities for the mentee to talk about concerns and ask questions.
- Invite the mentee to meetings or activities, as appropriate.
- Travel together to in-service or other meetings as appropriate.
- Arrange further frequent contacts through telephone, e-mail, fax, face-to-face, etc., as appropriate.

The following are some things mentors should avoid in the mentoring relationship:

**DON’T:**
- Criticize.
- Try to solve all their problems.
- Try to give advice on everything.
- Encourage mentee to be totally dependent upon you.
- Complain about your own problems.
- Be too busy when the mentee needs your friendship or your support.
- Take responsibility for the mentee’s programs or duties.
Responsibilities of the Mentee

Remember, your mentor is a supportive friend with a strong respect and concern for your professional development and success. Plan to devote time and energy to the relationship, just as your mentor does. Upon completion of the formal mentoring process, you should complete the Mentoring Program Evaluation and mail it to your supervisor (County or District Director).

The following are some things the mentee should **DO** in the mentoring relationship:

**Do:**
- Complete the Mentee Needs Assessment and send to mentor prior to initial meeting.
- Review your Mentor’s Biographical Sketch to learn more about his/her interests and background.
- Establish open and honest communication and a forum for idea exchange. Maintaining confidentiality between the mentor and mentee is essential! If something concerning the mentor or mentee needs to be discussed with others, it should be discussed first within the mentoring relationship.
- Understand what you want from the mentoring relationship and communicate your goals and aspirations to your mentor. Balance a personal and professional relationship with your mentor.
- Understand that you have to give as well as receive from the relationship.
- Act on your mentor’s advice when you feel it is applicable to your situation. Follow up with resources/references that your mentor gives you to find answers to questions or needed information.
- Keep all scheduled appointments with your mentor and display professional behavior and dress, as appropriate.
- Be aware that the Extension Educator is a professional-24 hours a day, seven days a week.
- Arrange frequent contacts with your mentor through telephone, e-mail, fax, face-to-face, etc.
- Be flexible on meeting times and places.
- Be realistic, maintain a positive attitude.
- Be ambitious and enthusiastic.

The following are things the mentee should avoid in the mentoring relationship:

**DON’T:**
- Ask for advice on everything. Have a purpose in each request.
- Ask your mentor to act in your place or tell you precisely what to do.
- Rely on your mentor to give or seek answers to all of your questions/requests.
- Complain about other people or missed opportunities in an unprofessional manner.
- Commit yourself to obligations you cannot keep.
- Cancel your meetings/visits with your mentor at the last minute.
Responsibilities of the County Extension Director (CED)

The role of the CED in the orientation and professional growth of a new educator is significant and long-lasting. The advice and direction provided by the CED will influence the new educator throughout their career. The mentor/mentee relationship is significant also, but shorter in duration, perhaps periodic or episodic in nature and related more to the new educator’s program area. It is for these reasons that the County Extension Director should stay deeply involved in the activities of a new educator even when provided the assistance of a mentor.

The CED’s position description states ongoing routine responsibilities to other staff in the office, however, a new educator presents challenges and obligations not necessarily encountered with any frequency by a CED. These responsibilities will draw on skills and a sense of awareness or attention not commonly required in dealing with staff established in the office and with their program activities.

The CED responsibilities listed below contribute to the orientation of the new educator, serve to assist the development of educational programs by the new educator, and contribute to the overall perception of the office by clientele.

Responsibilities of the CED to a new educator:

- Acquaint the new educator with basic Extension policies, procedures and culture of the organization.
- Inform the new educator of the operations of the office, including matters such as fiscal affairs, leave policy, office conference, etc.
- Discuss how all Extension personnel in the office contribute to a team effort, relate to one another, and what is expected of the new educator.
- Introduce new educator to the advisory system.
- Assist in the development of a Plan-of-Work (POW) and familiarize the new educator with Program Activity Reports (PARs) procedures.
- Introduce them to community leaders, elected officials, and others important to the office, generally, and their program area, specifically.
- Familiarize them with Extension events and activities in the county across all program areas.
- Acquaint them with the Performance Appraisal document and process.
- Assist the new educator in putting mentor advice into context in the county.
- Counsel the new educator on problems or opportunities they encounter.

The CED will interact with the mentor in the following ways:

- Communicate with and assist the mentor with reinforcement of their training for the new educator.
- Collaborate in joint efforts with the mentor.
- Periodically review the progress and needs of the new educator with the mentor.
- Coordinate with the mentor messages both are providing to the mentee.
Responsibilities of the District Program Specialist:

- Facilitate efforts of the new educator to put training and advice of CED and mentor into context.
- Aid the new educator in establishing an individualized program responsive to their creativity and initiative.
- Provide the new educator with assistance and insight in their approaches to POWs, performance appraisals, etc.
- Assist in exposing the new educator to programs of educators in other counties.
- Be responsive to new educator needs as referred by the CED or mentor.
Recognition and Compensation of Mentors

Upon completion of the formal mentor training, each mentor will be recognized as a “Certified Extension Educator Mentor”. Mentors will be recognized during annual performance appraisal conferences.

During the pilot mentoring program up to 20 mentors will be selected for mentoring training. The mentor will receive a $400 professional development incentive to be used for advanced professional development opportunities. This would include opportunities above and beyond statewide in-service training sessions and state association meetings. These opportunities will be subject to prior district director approval. This incentive is in recognition of the additional commitment required to fulfill this critical role. Funds may be drawn on after 6 months in the mentoring relationship but must be used within 18 months after completion of the mentoring relationship or funds will be forfeited.

Any associated travel expenses (travel above and beyond what would be typical visits at regularly scheduled meetings) up to four face-to-face visits will be reimbursed by state funds. A separate travel form should be submitted to the district office following each visit.

Recognition of Mentee

The mentee will be recognized at an appropriate District or State level event or activity upon completion of the formal mentoring process. A mentoring process exit conference should be conducted by the supervisor at the conclusion of the one-year formal mentoring process and should include the supervisor, mentor and mentee. The Mentoring Relationship Evaluation (Attachment 7) should be completed by the supervisor and submitted to the Office of Staff and Program Development, along with attached copies of the Mentoring Program Evaluations completed by the mentor and mentee.
OCES Core Competencies

Communication
- Practice active listening skills
- Effective use of written, oral, and electronic communication
- Respond promptly and diplomatically to inquiry
- Use a variety of methods to positively promote the Cooperative Extension Service
- Communicate effectively with diverse audiences, other professionals and co-workers

Flexibility
- Demonstrates openness to new ideas
- Adapt well to changing priorities, situations, and demands
- Demonstrate ability to compromise
- Adapt to time and role requirements

Initiative
- Demonstrates motivation, commitment, and dedication
- Follow through with projects in a timely manner
- Work to maintain an area(s) of expertise
- Take calculated and educated risks to strengthen programming
- Use sound judgment
- Use innovative programming to address changing needs of clientele

Organization
- Demonstrates effective management of time, resources, and people
- Is prompt, timely, and dependable
- Successful management of multiple projects

Professional Orientation
- Exhibits honest and ethical behavior
- Presents appropriate and professional appearance
- Possess and display a positive self image
- Accept and follow OCES policies and procedures
- Exhibit professional courtesy

Program Planning, Implementation, and Evaluation
- Develop and actively implement a substantial and innovative Plan of Work
- Present programming in a professional manner
- Encourage participant involvement
- Build rapport with program participants
- Deliver information in an effective manner
- Work effectively with program advisory committees
Service Orientation
- Identify and develop programs to meet critical needs
- Demonstrates effective development and delivery of educational programming for diverse audiences

Teamwork/Leadership
- Use proactive approach to problem solving
- Encourage creative thinking in decision making
- Take responsible risks and makes timely decisions
- Effective use of volunteer leadership
- Effective use of committee structures to develop and implement programs
- Work cooperatively with and is supportive of co-workers
- Work toward group achievement
- Build and maintain positive relationships and work effectively with clientele and other professionals

Technology
- Demonstrate competency and effective use of computing and computer-based communications technology (electronic mail, word processing, World Wide Web, etc.)
- Use technology effectively and appropriately
MENTOR APPLICATION FORM

Name: __________________________

Address: _________________________

Position/Title: ___________________

Phone: __________________________

E-mail: _________________________

FAX: __________________________

Describe why you want to be a mentor:

What do you consider you most valuable strengths as a mentor?

What do you want to gain from the mentoring process?

Describe any previous experiences you have had as a mentor:

Please attach a copy of your current curriculum vitae or resume along with the Mentor Biographical Sketch.

Send to: Director, Staff & Program Development
255 Ag Hall
Stillwater, OK 74078

Send copy to immediate supervisor and District Director
MENTOR/MENTEE BIOGRAPHICAL SKETCH

Purpose: To provide basic information to facilitate the development of a positive relationship. (All personal information is voluntary).

Name: ______________________________________________________

Address: ___________________________________________________

Position: ____________________________________________________

Phone: _____________________________

E-mail: _____________________________

My most valuable strengths are:

(Mentee Only) Topics I would like to discuss with my mentor include:

My hobbies/leisure interests:

About my family:

Community Activities:

The reason I am excited about a career in Extension is:

Please attach a copy of your current curriculum vitae or resume and send to the mentor/mentee within the first week of the relationship being announced/determined.

Send copies to: mentor/mentee, immediate supervisors, Director, Staff & Program Development
Attachment 3

Sample Letter

The following is a sample that a new mentor might send to the new Educator as a way of initiating the relationship:

______________ County Extension Office
Educator Boulevard
All Town, OK  00000-0000
(Date)

Dear ____________ (Mentee):

I am pleased that we have been matched as mentor and mentee to participate in the Oklahoma Cooperative Extension Service Mentoring Program. It is my hope that this relationship will provide a positive, professional, educational and personal support system for you.

During our time together, we will examine the Extension Service’s philosophy, goals and values; identify resources and resource persons; and share skills, knowledge and ideas pertaining to the job of Extension Educator. We will also have time to discuss any concerns or questions you may have. Let’s plan to have at least four face-to-face visits throughout the year and also keep in regular contact by phone, e-mail, and/or fax.

I would like to meet with you sometime this month (first month after pairing is announced). Here are some dates I have available: ____________ . Please check your calendar and let me know a date that is convenient for you. I look forward to working with you this year.

Sincerely,

Mentor

xc:  District Director
     County Director
     Director Staff & Program Development
Mentee Needs Assessment

Complete this needs assessment before the initial meeting with your mentor. Send it and the biographical information to your mentor before the first meeting. This is a discussion tool only, not an assessment to be used for evaluation purposes.

Rate from
1 = greatest need to discuss
7 = low priority topic to cover

Communications
Writing Newsletters
Interacting with the Media
Presentation Skills
Interpersonal Skills
Managing Conflict
Radio/TV Presentation Skills
Computer Skills/Web Site Development

Program Development
Understanding the Annual Plan of Work Process
Understanding the Program POW Process
Meets Assessment Strategies
Marketing Programs
Managing & Acquiring Resources for Programming
Program Evaluation & Documenting Input
Working with Advisory Committees
Available Specialist Support
Communicating Program Results to Clientele
Teaching Strategies
County Programming and Calendar

Personal Effectiveness
Work Effectively
Balancing Personal & Professional Life
Flexibility & Maintaining a Schedule
Developing Oneself
Interacting with Clientele
Managing Walk-ins, Phone Calls & E-mail
Career and Recognition
Professional Associations
Awards & Recognition
Performance Appraisal Preparation

Organizational Structure and Culture
Extension Organization (district/area/state)
Informal/unwritten rules
Language in Extension
Building Relationships & Networking
Cultural Competence/Diversity

Other Needs

Rate from
1 = greatest need to discuss
5 = low priority to cover

What are the most important things you would like to get from this relationship?

Preferred method of learning? (self-directed, auditory listening), (experiential hands-on), (shadowing/observing, etc.)
MENTORING PROGRAM EVALUATION

Name: ____________________________________________

Check one: ______ Mentee ______ Mentor

The purpose of this evaluation is to give new mentees and mentors the opportunity to provide feedback to improve the mentoring program. Your thoughtful response to these questions is appreciated and will be handled confidentially. This form should be completed at the end of the one-year formal process.

Briefly describe your experiences working with the mentor/mentee and the effectiveness of the relationship:

Describe three or four activities that were most helpful in developing your mentoring relationship:

Describe three or four barriers that affected the development of the mentoring relationship:

What suggestions do you have for making the program stronger?

Send to: Mentee’s Supervisor
District Director
Suggested Discussion Topics for Mentor

Based on the mentee’s needs assessment, the following are suggestions on how to address the specific needs of the mentee. You may want to plan to address some of these at your initial meeting.

Communications

- Discuss importance of evaluation forms after program delivery to see if your planned objectives were met.
- Share newsletters with mentee.
- Share news articles you prepared.
- Share a radio/TV tape or invite to next taping.
- Invite the mentee to see you conduct a program.
- Share your perspectives on office communications, teamwork, conflict, etc.
- Discuss appropriate attention to phone and e-mail messages.
- Emphasize importance of reviewing daily planning (calendars).

Program Development

- Invite to an advisory committee meeting.
- Invite to attend a volunteer meeting.
- Invite to a program of the mentee’s interest.
- Share successes and failures in programming.
- Share program announcements with mentee.
- Share key contacts and resource persons.
- Support creativity and energy of mentee, particularly as they relate to programming.
- Share programming resources.
- Invite to attend planning meeting.
- Discuss importance of evaluating impact of programming efforts.
- Discuss importance of conducting interpretation events to share program success.
- Discuss programming for reaching underserved audiences and those with special needs.
- Explain importance of and how to network with other agencies/organizations.
- Discuss importance of understanding local power structures and relationships.
- Discuss importance of “sign in” attendance rosters for reporting.
- Discuss importance of surveying audience for reaching audiences’ needs.

Personal Effectiveness

- Discuss protocol/informal rules in Extension.
- Discuss utilization of support services.
- Share your time management techniques.
- Share your perspective on maintaining balance with work/family.
- Discuss importance of community involvement.
- Invite to upcoming in-services.
- Identify professional associations/upcoming dates and invite to join/attend.
- Encourage mentee to apply for awards (i.e. rookie, communications, etc.)
- Discuss professional image.
Suggested Discussion Topics for County Director

**Working with County Commissioners’ and Other Key Officials**
- Elected officials
- Appointed officials

**Managing Resources in the Extension Office**
- Telephones
- Secretary
- Shared equipment
- Meeting rooms
- Office hours

**Budget and Budget Process**
- Access to agency funds and other funds
- Reimbursement of expenses

**County Extension Program Orientation**
- Staff Meetings/office conferences
- County educators’ roles and responsibilities
- County Director responsibilities
- County demographics and background information
- County organizations, collaborators and key leaders
- Summary of Outcome Program (Annual Report in Planning/Reporting System)
- Activity reporting (monthly reports in planning/reporting system)
- County annual program plan
- Monthly reporting system
- Office filing system
- Postal mail guidelines
- Working with local mass media
MENTORING RELATIONSHIP EVALUATION

Supervisor’s comments regarding Mentee’s progress to date:

Supervisor’s comments regarding Mentor’s effectiveness:

This is to indicate that __________________________ (Mentee) has completed the formal one-year mentoring relationship and has met the expectations of the Extension Educator Mentoring Program.

__________________________  __________________________
Supervisor’s Signature         Date

This evaluation is to be completed following the mentoring process exit conference. This form, along with a copy of the completed Mentor and Mentee Evaluations, should be sent to:

Office of Staff & Program Development
255 Ag Hall
Stillwater, OK  74078