

# ADULT LEARNING

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# Shifting Gears: The Mentee in the Driver's Seat

Good mentoring depends on effective learning. Effective learning depends on the readiness, willingness, and openness of mentoring partners. The concept of mentoring as a partnership does not come easy to many who experience mentoring through the lens of the traditional paradigm that focused on an older, more experienced person passing on knowledge and information to a younger, less experienced one (Zachary & Fischler, 2009). That model is being replaced by a more learner-centered approach, one that requires a conscious shift in roles for both mentor and mentee and a re-orienting of the learning process (Daloz, 1986).

These shifts require a different mindset. A parallel can be drawn to the process of learning to drive a manual transmission automobile. Shifting gears requires attention and practice to become attuned to the engine and respond appropriately. Having someone sitting next to you while you are learning to shift gears is helpful. Having a backseat driver tell you what to do and when to do it is not.

Mentoring using a learner-centered approach (Daloz, 1986; Zachary, 2000) may be challenging for individuals who have been mentored or who mentored others in the more traditional model. It will require a shift in roles, but we believe that it is necessary in order to be able to make the most of a mentoring experience. Let's take a look at a mentoring relationship that was a wake up call for two mentoring partners who needed to reexamine their respective roles.

## A Wake Up Call

Tina was looking forward to being mentored by Chris, an Executive Vice President in her organization. She was eager to learn about his career path, choices, successes, and failures. At their first mentoring meeting, Chris got down to business immediately. He had been in the organization for more than ten years and had some pretty clear ideas about what Tina should be focusing on at this stage in her career. He began the meeting by laying out a list of goals that they would work on together.

Tina sat passively, listening to Chris as he outlined HER goals and HER career path. She found Chris intimidating and chalked it up to his senior position in the organization. She was completely put off by the direction Chris was taking the relationship. Tina was at a loss about what to say or do. This was not the mentoring relationship she had envisioned.

As Tina returned to her office, she considered bailing out. A trusted coworker listened to her vent and then pointed out that by not speaking up Tina had essentially relinquished the driver's seat and now needed to get it back. She helped Tina understand that Chris might have interpreted her lack of response as endorsing his plan. Tina hadn't pushed back, offered an alternative, or shown much resistance. She had to acknowledge that part of what had made her really feel disengaged was the disappointment she felt in her own behavior in front of a senior manager. It wasn't like her not to offer an opinion. She disliked being so passive. She was ready to take the wheel and shift gears.

**By Lory A. Fischler  
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## Shifting Gears

Tina decided to take control of the relationship by developing an agenda for their next mentoring meeting. Her agenda included three items: (a) making time to get to know each other by talking about their own mentoring experiences and career paths; (b) setting ground rules and structures around their relationship (including how often they would meet, where and when), and (c) reviewing the three learning goals she had formulated, with time to react and identify learning opportunities and strategies for achieving them. She emailed her agenda to Chris and waited with baited breath.

Chris was surprised when he opened Tina's email and read her agenda. He had planned on starting their meeting, set for the next day, by asking for an update on her progress on the goals he had identified. Instead, he saw that she had allocated time for a conversation about his career path and their personal experiences with mentoring. At first he was put off. She was the junior staff member, telling him what to discuss? Was that really a good use of his limited time? As far as Chris was concerned, his valuable time was best served helping a junior person develop skills and knowledge that would benefit the company. Everything else seemed like fluff. He printed Tina's agenda and went back to work, somewhat annoyed.

During the day, his thoughts drifted back to Tina's email and her mentoring meeting agenda, sitting on top of his pile of papers. "Gutsy move", he said out loud, smiling. He began to recognize that in his first meeting with Tina, he hadn't really been engaged with her. She hadn't spoken up, and he didn't really get a chance to know her. He had seen his mentoring role as more of the assignment giver, similar to his role with his subordinates. "Do these six things and then get back to me." Maybe that wasn't what he was supposed to do as her mentor. Chris could see by the first few items on her agenda that Tina had intended to get both of them to step back and take more time building the relationship. She was right, he acknowledged, to slow things down. He could now see her intention. She wanted to drive their meetings and set the pace, the goals, and the direction. Chris was aware that having Tina set the agenda and the game plan could be very helpful and time-saving for him. For the first time, he eagerly looked forward to their next mentor meeting and a chance to help Tina achieve HER goals.

Tina and Chris' experience illustrates that mentoring can mean different things to different people depending on their prior experience.

## Mentoring: A Best Practice Definition

Let's look at mentoring in its best and fullest practice. Mentoring is a reciprocal learning relationship in which mentor and mentee agree to a partnership, where they work collaboratively toward achievement of mutually defined goals that develop a mentee's skills, abilities, knowledge and/or thinking (Zachary, 2000). This definition is based on sound adult learning principles and practices. It implies that for mentoring to be truly successful, it should include the following elements: reciprocity, learning, relationship, partnership, collaboration, mutually-defined goals, and development. As we explore the definition we will return to Tina and Chris' mentoring relationship to explore the dynamics of each of these elements.

### *Reciprocity*

Reciprocity is the equal engagement of the mentor and mentee. Mentor and mentee each have a role to play and a responsibility to the relationship. Each one has much to gain from the relationship. Indeed, mentees often wonder what is in the relationship for the mentor. Mentors say that they gain a great deal of satisfaction from sharing their knowledge and experience. Their own perspectives expand as a result of engaging in a mentoring relationship. Often it reaffirms their own approaches or suggests new ones. It helps reconnect them to the people in their organization. They become reenergized. It is important

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that mentees keep this in mind. If they see themselves only as receivers of help and advice they may be reluctant to ask for what they need.

If Chris and Tina had stayed on Chris' initial course, there would have been no reciprocity. It would not have taken long for Tina to lose energy and enthusiasm. It was only when Tina took the driver's seat of their relationship that reciprocity was possible. Tina learned quickly that she had to speak up to senior leaders when she had something important to say, that she needed to take hold of her own learning and career path and use a mentor as a guide, not as a director. Chris, too, benefited immensely from the relationship in ways Tina didn't appreciate until later in their relationship. After Tina's email, Chris recognized that when he gave his mentee direction without taking

time to involve her in the dialogue, he was getting quiet pushback. He had assumed Tina's silence meant tacit agreement. This gave him pause to reflect later on his own directive style with his team that might be producing the same results. He usually told his people what to do and assumed they were on board. He started to take a different approach, asking more questions and getting input on other points of view. As a result, he noticed that his team became more engaged, ideas seemed to bubble up and flow, and there was an increase in energy and productivity.

### ***Learning***

Learning is the purpose, the process, and the product of a mentoring relationship (Zachary, 2005). Even if the relationship itself is good, without the presence of learning, there is no mentoring. By learning we mean more than simply acquiring knowledge, which is a necessary but not sufficient aspect of learning. The learning that goes on in a mentoring relationship is active learning (Daloz, 1986). The mentee gains expanded perspectives; knowledge about the ins and outs of the organization, field, or profession; an understanding of what works and what doesn't work; and, most importantly, a deepened self-knowledge and understanding. The process of critical reflection enables the mentee to transform and apply learning in new ways (Brookfield, 1995; Herman & Mandell, 2004).

Tina and Chris invested time in getting to know each other's experiences, interests, styles and approaches so that their work together could center on Tina's learning needs. They created a game plan that focused on providing Tina with a set of new experiences and then meeting afterwards to reflect on what she had learned, observed, and integrated. It worked for Chris who was practical and goal-oriented and wanted their time together to produce clear results. It worked for Tina who wanted to be exposed to new and specific kinds of experiences and be able to get a senior leader's perspective.

### ***Relationships***

Relationships don't magically develop. They take time and work. Working on and in the relationship is critical to effective mentoring. Initially, this element was missing in Tina's and Chris' partnership. Tina felt like she was engaged in a one way transaction instead of a two-way relationship. In fact, she felt that the path that Chris had carved out for her could have been negotiated with her own manager or with the human resources department. She had wanted something more personal from her mentor. She knew that it takes time to feel comfortable sharing work concerns and challenges and failures

with another person, let alone a senior VP. She wanted and needed help from someone in the organization who was interested in her success and well being, not just the return on investment. Once Tina and Chris began to interact, reflect, and draw on each other's experiences and perspectives, their relationship deepened and flourished. Tina felt valued as a person.

It is hard to learn if you don't feel valued in the relationship. Tina and Chris had to work on establishing and maintaining trust in the relationship (Herman & Mandell, 2004; Palmer, 1998). Tina was also disciplined about keeping their issues work-oriented. She knew Chris wasn't interested in spending too much time on personal issues. Chris had to remind himself to take an interest in what was going on in other parts of Tina's life. Although it wasn't natural for him to do the "TLC (tender loving care) thing," he did start every meeting by asking her how things were going at home with her family and her two young children. And at their last meeting they spent their first ten minutes talking about a movie they had each recently seen. These conversations helped ground their relationship and move it forward.

### ***Partnership***

Partnership is the essence of the learner-centered approach to mentoring. The mentee plays a much more active role in the learning than in the traditional mentor-driven paradigm, even in situations in which the mentee has been recruited by the mentor. The mentor's role has changed from the "sage on the stage" to the "guide on the side" (Zachary, 2000). There is a shift away from the more authoritarian, teacher-dependent, student-suppliant paradigm, where the passive mentee sits at the feet of the master and receives knowledge, to one in which the mentor is now less of an authority figure and more fully engaged in the learning relationship.

In their first meeting, Chris resembled the old paradigm mentor, an authority or powerful person driving the relationship, taking his mentee under his wing. The mentee was there solely to receive the wisdom and be prodded, protected, and promoted. As Tina took ownership of the relationship, they established meaningful agreements and became more attuned to each others' needs. During a particularly challenging time at work, Tina asked Chris if they could back away from some of their goals for about six weeks while she completed a big project. They decided that they would scale back their meetings and do more on-line check-ins during that period. Rescheduling relieved Tina of the burden of juggling her mentoring relationship with her work, and protected the relationship from getting off course. After her project was successfully launched, they



scheduled a long lunch meeting. This meeting gave them time to regroup, talk about the project, and then refocus on her goals.

### ***Collaboration***

As with any partnership, collaboration is key to success. Mentor and mentee engage in sharing knowledge, learning, and building consensus and, in the process, mutually determine the nature and terms of the collaboration. The mentor and mentee bring personal experiences and individuality into the dialogue. This give and take contributes to creating shared meaning and something greater emerges because of it.

Tina was highly organized. As the date approached for the closure of their mentoring relationship, she thought about what she wanted to do to thank Chris. She put together an agenda for the meeting, just as she had always done. At the top of the list was a review of “lessons learned.” Letting Chris know about his impact on her growth and development and what she had learned from the year-long experience was something she knew he would value. Chris saw the item in advance of the meeting and smiled. For their last meeting, Tina again was guiding their content. “Good for her,” he thought. “What a nice way to spend our last meeting together.” Chris spent time thinking about what he had gained from the experience so he could come prepared for their meeting.

### ***Mutually Defined Goals***

Clarifying, articulating, and monitoring learning goals are critical to achieving a satisfactory mentoring outcome. It is hard to achieve a goal when it has not been clearly defined. Mentoring partners must continuously revisit their learning goals throughout the mentoring relationship to keep it on track. Without well-defined goals, the relationship runs the risk of losing its focus.

Tina and Chris were lucky. Had they stayed on the path Chris had initially set, Tina’s learning goals might have been defined, but they would not have led to a satisfying learning relationship. Although Tina created an agenda which outlined her own goals and ambitions, it was her dialogue and reflection with Chris that ultimately honed those goals, set priorities, and created the game plan for their work throughout the year. After her big project ended and Chris and Tina debriefed the experience, they both realized that Tina’s understanding of financials needed to be strengthened in order for her to achieve her long-term career goals. They set a new goal together and developed some learning opportunities to help her get there.

### ***Development***

A mentoring relationship is future-directed, moving from where the mentee is to where the mentee wants to be by developing the skills, knowledge, abilities, and thinking to get there. After the first two sessions and Tina’s push back, Chris began to see what mentoring could be. Up until then, he viewed mentoring as a way to build the skills of employees so they could do their job better and faster. Tina’s laser-focus on her career and her conversations about where she wanted to see herself helped Chris realize that he needed to shift his role. He wasn’t her supervisor, helping her acquire the skills to complete tasks that he needed her to accomplish. He was there to help her figure out what she needed to know and learn. It took time for him to be comfortable with the idea that he didn’t have to have all the answers; his role was to ask the deep questions. It was hard at times for him to keep himself in check. His tendency was to get briefs and reports, and focus on the “hard data” and not the “soft (people) stuff.” Many mentors tell us that this “aha” is the biggest shift that happens for them and remains their biggest challenge throughout their relationship.

### ***Coming Full Circle***

As the learning relationship evolves, the mentoring partners share accountability and responsibility for achieving a mentee’s learning goals. Chris and Tina talked about their lessons learned at their final meeting. Although the practice of mentoring today is becoming increasingly more consistent with what we know about how adults learn best, much of the current practice of mentoring still reflects the more traditional model. Instead of being mentor-driven, with the mentor taking sole responsibility for the mentee’s learning, the mentee needs to be in the driver’s seat, sharing responsibility for the learning, setting priorities and resources, and becoming increasingly self-directed. Shifting the role from authority to facilitator allows a mentor to nurture and develop the mentee’s capacity for self-direction (from dependence to independence to interdependence) over the course of the relationship until the learner is ready to assume the full degree of responsibility.

Tina and Chris grew as a result of their mentoring relationship. Chris shifted from the mentor in the classic role, directing and telling, to the mentor who guided, supported, and provided learning opportunities. Chris’ evolution as a mentor helped him become a better leader with his own people. He still continues to mentor others and use his lessons learned to build the capacity of other mentees and direct reports. Rather than becoming a mentoring dropout, Tina grabbed the steering wheel.

Doing so helped her grow as an employee and potential leader. Her success with Chris encouraged her to take a more active role in all her interactions. She became a stronger person, manager, and leader. Tina is now a mentor for others. She puts her mentees in the driver's seat from day one by getting to know them, asking them about *their* goals, and setting an agenda together.

Successful mentoring requires a clear understanding of mentoring and the central role of the mentee in driving the relationship. The ride may be bumpy. There may be twists and turns ahead. But when mentoring partners mentally shift gears to a learner-focused model of mentoring, they stay on course, reach their destination, enjoy the journey, and are far better off for having taken the ride.

**Reflection Questions for Examining and Expanding Mentoring Practice**

1. Think about your past mentoring relationships. Who was the driver in your relationships and how did that role affect the learning that went on in the relationship?
2. What challenges do the mentees in your organization face when a mentor is in a more senior or powerful position?
3. What training does your institution provide to help mentors like Chris (who were mentored under the traditional mentoring paradigm) shift gears?

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