

Mentoring Portfolio

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Mentor: Annaliza Santos Finance Manager MA Leadership, candidate	Mentee: ██████████ BS Accountancy, student Azusa Pacific University
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Mentoring Sessions

Session I

The first mentoring session will focus on establishing the goals and objectives for the next four mentoring sessions. Mentor and mentee will work together to achieve specific, mutually defined goals that focus on developing the mentee’s skills, abilities, knowledge, and thinking (Zachary, 2012).

The first session as influenced by Horton and Freire (1990) will start “With conversation by saying something to each other about the [mentor and mentee’s] every existence in the world. They will speak a little bit about their lives and work, and then they will interact in some moments of the conversation as a starting point” (p. 5). The initial conversation will help establish a space for comfort and ease.

The mentor will present the following goals and objectives to her mentee for discussion and revision, if necessary:

- To develop a better understanding of the corporate world
- To enhance the mentee’s advanced accounting technical skills
- To develop a better understanding of numbers, corporate conflicts, and leadership
- To determine the key take away and outcomes of the mentoring program

During the first session, the date, time, and location will also be part of the discussion.

The mentor will propose several schedules that will match the mentee's available time. The mentor will make sure to work around her mentee's schedule since her mentee is currently taking very extensive accounting courses.

Session II

Schedule: December 7, 2013, 6:00 – 8:00 pm

Where: Marshburn Library, East Campus

Goal: To enhance mentee's technical skills:

Learning activities:

- Advanced accounting
- Overview of several accounting systems

The session two will start on the finalization of the goals for the next four sessions. The mentor will ask her mentee if the goals and objectives discussed from the previous session fit her learning style and interest. Mutually defined goals are important for a smooth-sailing mentoring relationship. Refining the goals will also help establish a strong mentor-mentee relationship. Zachary (2012) argued that, "Strong relationship motivates, inspires, and supports great learning and development" (p. 4).

The next focus will discuss the mentee's technical skills in advanced accounting. The mentor will ask her mentee about her current technical skills in spreadsheet and accounting systems. Discussion will mainly focus on accurate recording of financial information, use of advanced spreadsheet, creating financial statements, and introduction of PeopleSoft system.

Mentee Outcomes:

- Understand advanced accounting, spreadsheet, and financial statements
- Explore new accounting system

Session III

Schedule: December 14, 2013, 3:00 – 5:00 pm

Where: Classic Coffee, Glendora, CA

Goal: To develop a better understanding of numbers, corporate conflicts, and leadership

Learning Activities:

- Numbers and conflicts
- Conflict resolution process

The third session will focus on recognizing conflicts in a working world. Part of the learning activities will start with the article of Siegel and McGrath (2003), *Recognizing and Addressing Conflicts of Interest*. The article helps practitioners identify conflicts in the financial world. The article also identifies different threats usually face by accounting practitioners such as self-interest threats, self-review threats, advocacy threats, familiarity threats, and intimidation threats.

On the third session, the mentor will also discuss her real-work conflict experiences. Discussions will take place on several situations, as well as the actual resolution process. The mentor will also present a sample case study regarding conflict, and she will let the mentee provides the resolution appropriate for the situation.

Mentee Outcomes:

- Learn about the working world, both financial and non-financial
- Explore real-life and case study conflicts and learn to develop a resolution process

Session IV

When: January 15, 2014

Where: Marshburn Library, East Campus

Goal: To explore leadership, self-awareness, and mentee's goals and dreams

Learning Activities:

- Explore the organization
- Leadership and numbers: Pros and cons
- Self-awareness, goals, and dreams

On the fourth session, the mentor will explore the topic of leadership. The mentor will cover some leadership theories and leadership applications in the real world. Some of the leadership topics that will be part of the discussion are servant leadership in the financial world, authenticity in the corporate world, and self-awareness.

The book, *True North* (George & Sims, 2007) will be a big part of the fourth session discussion. The mentor and mentee will engage in a conversation about the process in knowing the authentic self. David Benner's book, *The Gift of Being Yourself* (2004) will be part of the discussion as well.

The last part of the session four meeting will focus on the mentee's goals and dreams. One of the mentee's homework is to list her goals and dreams. The mentee will share her list with her mentor for discussion.

Mentee Outcomes:

- Understand the world of leadership in connection with finance and accounting
- Learn about the importance of self-awareness in preparation for the real working world

- Explore the importance of self-awareness as a way of achieving one's goal and dream

Session V

Schedule: January 17, 2014

Where: Glendora, CA

Goal: To determine the key takeaways and outcomes of the mentoring program

Learning activities:

- Key takeaways
- Mentoring program outcomes
- Continuous learning opportunities

This session is the conclusion of the five meetings requirement for this project. On this session, the mentor will open the discussion with a thank you prayer for the mentee's time, creativity, and active participation. The conversation will proceed on the learning outcomes from session one, two, three, and four. The mentor will engage her mentee to share her key takeaways from this project, and she will also ask her mentee to share her overall experience.

The coming to closure phase of the mentoring program is more than simply marking the end of the mentoring relationship, it is an opportunity to recognize and celebrate what the mentor and mentee have learned (Zachary, 2012). The mentor will also use this opportunity to propose a continuation of the mentoring relationship between the mentor and the mentee.

The Mentoring Experience

Session I

The first meeting with my mentee happened on November 24, 2013. Because we knew each other already, the connection was established right away. My mentee is one of my student workers in the organization I am currently working at. She is a junior accounting student at Azusa Pacific University, and accounting is one of the common grounds we have. I work as a Finance Manager and handles purchasing, department budgeting, etcetera.

Because of our work relationship, she somehow shared her goals after finishing college. She shared her dreams of working in a corporate office as an accountant, and she also shared her fears about the real world, the life after school. I think our mentor-mentee relationship started even before I asked her to be my mentee. The informal mentoring relationship was established at the workplace. I remember her asking me how I like my finance job, how I handle conflicts, and numbers. I also remember teaching her some technical terms and aspects about finance or accounting.

Our work relationship and common background established our mentor-mentee relationship. At our first meeting, I laid out some of the goals I hope to achieve for this mentoring plan. We discussed the schedules, the best time to meet, and the hours for each session. I initiated the scheduling process, but I let her made the final decision since it was her finals for the semester. The scheduling process went very smoothly.

At our first session, I shared with her my plans for session two to five. I gave her my plans and goals for the next four sessions. I let her review the list I gave her, and I gave her the opportunity to raise questions and suggest revisions if necessary.

Our first meeting lasted for hour and a half. We chatted not only about our mentoring sessions, but our lives as well. I learned more about her, and I believed she learned more about me as well.

Session II

Our second session was held on December 7, 2014 at the Marshburn library. Our main plan for that session was to discuss about advanced accounting and an overview of several accounting systems. The session went out as planned. I gave her some tips and techniques about excel. We discussed advanced accounting and terminologies. I presented a case study and we applied some advanced accounting to solve the problem. For that session, we also discussed the PeopleSoft accounting system.

The technicalities session seemed to burn out both of us; we felt we were in a classroom session solving a case study. We both laughed after that realization. I initiated to change the topic, and we ended discussing some realities about the working world. She animatedly asked me how I landed on my first job. I told her my experience as a bank teller, my experiences how I handled furious customers, and how I handled some complicated accounts. I also told her my experience moving out from a banking industry to an educational setting where I worked as an accounting assistant dealing with undergrad students everyday. I shared with her my experience and how I handled the new setting. At the school setting, I handled students tuition fee, I even experienced sitting in a cashier's office for some of the days we were short-handed. There, I experienced having a student crying to get a promissory note for final exam. As I shared my experience with my mentee, I asked her, "What will you do if you are sitting in a cashier's office, and a student comes begging you to get a promissory note for her/his final exam?" My mentee handled my question very carefully, and she gave me a very satisfying response.

We finished our second session with the finalization of our mentoring plans. We also formalized our session dates for the next three meetings.

Session III

Our third session happened on December 14, before the holiday break. We decided to meet at the Classic Coffee in Glendora. The third meeting goal was focused on numbers and conflicts. We started the conversation with hi and hello, checked each other's day, and plans for the holiday. She said she will fly back home in Northern California for three weeks. She was hired as a sales associate at Banana Republic, and so she will be working full-time over the course of three weeks. We continued our conversation as I mentioned that I worked also as a sales associate back on my college days. We laughed on the similarities of some of our life instances.

The work conflict conversation started with our experiences in a retail industry. Since this was not her first work experience in the retail store, I asked her some work scenarios that tackled about conflict. With my experience and her experience, one by one, we discussed the presented case. We dug the situation from the bottom until we saw the main cause of the conflict. The retail experience and conversation were not plan of our session plan that night, but it was amazing that we ended up talking those things that were really necessary to my mentee's life and work. We both appreciated the fact that we knew where we coming from, and we knew what we were talking about.

After our retail conversation, I initiated a new conversation about corporate work conflict. I asked how ready she is in the corporate world. She said she was not really sure. I animatedly told her about my life stories in a corporate office. I shared several work conflicts I experienced, and instead of telling her how I resolved them, I asked her, "What will you do if

you were in my situation?” That particular question evoked my mentee to think deeply. She told me how she thinks she will handle the situation. It was totally different approached with what I did, but I held my judgment. What I did, I presented her with my approached and we made a contrast and comparison of the situation, and how we handled the situation. Our conversation with work conflict went very well. We discussed a lot of things, and I learned a lot from my mentee. I hope she learned something from me as well.

Session IV

One of the challenges we met was the scheduling of our last two meetings. Because of the holiday season and the short time frame provided for this mentoring project, the last two meetings were quite difficult. My mentee came back on January 11th, and I appreciated her effort of initiating our meeting dates. We finally agreed with the date and met on January 15th. Our conversation lasted for couple of hours, and it was one of the highlights of my week. We talked about her vacation with her family, her part-time job over the holiday at the retail store, and her first week of school. Our conversation segued to her holiday experience working in the retail store. The session four ended up to be a continuation of work conflict discussion. She narrated some of the conflicts she experienced in the retail store, how she worked ten hours a day rotating from the cashier’s department, to the fitting room, and some of the holiday store work conflicts. One of the biggest conflicts she experienced happened between her and her supervisor. I asked her to tell me whole story. Based on her story, the conflict started when her supervisor changed her working schedule last minute. Due to her prior commitment, she was not able agree with the schedule, and that was how the conflict started. I asked her, “What did you do then, how did you resolve it?” My mentee responded, “I was upset because I thought it was my supervisor’s fault. I committed that time for my family, but then all of a sudden she was going to

change my work schedule last minute. I thought that was unfair.” I let her continued with her story. My mentee said, “Then I realized from our last session discussion, you mentioned real conflict at work...and then I told myself, know what, this is a real world, I need to handle this. I set a short meeting with my supervisor, ironed out the problem, and finalized our schedule and conflict. It was such a great feeling handling my own issues and conflict at work, thank you.”

My mentee’s last words “thank you,” gave me goose bumps. I did not see that coming. What we accomplished for the last four meetings was different and never expected. Not only a mentor-mentee was developed, but a great friendship as well.

Before we parted that night, she shared with me her goals and dreams in life. Definitely, she will finish her accounting degree and will work in a corporate world like she dreamed of. One thing I noticed from her list was her interest in the field of nutrition and the anti-abortion topic. I asked her, “How did this passion and interest start? Are you seeing yourself exploring these fields later on?” I left her with those questions and bid good night.

Session V

My mentee and I met on January 17th for our fifth mentoring session. That was the last session for the mentoring class, but we decided to meet every other week to continue what we started. We opened our conversation with a quick prayer. I endlessly thanked her for agreeing to be my mentee and for all the time she spared with me. It was definitely appreciated.

On the last session, we focused on the outcomes of the last four sessions. I asked her what were her key takeaways from the discussion we had and from the sharing of stories we enjoyed. One of the things she shared was her realization on the last question I gave her from our previous meeting. She said that I really evoked her with my question about her passion in

nutrition and anti-abortion. She said that is the process of figuring things out. I decided to give her some names related to those fields that she could connect with in the future.

We wrapped our fifth meeting with discussion on leadership, authenticity, importance of self-awareness, and her professional plans. I shared with her some of the highlights I learned from the True North book. We ended our conversation planning our next meeting, over coffee or lunch. It was a wonderful experience.

Analysis

Mentoring was defined as a process for the information [and formal] transition of knowledge, social capital, and the psychosocial support perceived by the recipient as relevant to work, career, or professional development (Bozeman & Feeney, 2007). The mentor and the mentee establish the mentoring relationship because they agree to engage in a learning process. Because of the common goal they want to accomplish.

The mentoring portfolio requirement for LDRS 516 met some challenges in the beginning. Time constraints, actual mentoring curriculum development, and schedule were some of those challenges. It all came together when the mentor found her mentee. The idea, goal, and the connection came in a spark because of the commonalities they found together. Conversations, engaged dialogues, and commitments came easily because of the common ground they were standing. Commitment by and engagement of mentoring partners are the key elements in establishing, maintaining, and experiencing successful relationships (Zachary, 2012).

One of the main frameworks used in this mentoring portfolio was the dialogue education introduced by Paulo Freire (1972). [Mentoring] with dialogue education involves listening to learners at every level, respecting them as subjects or decision makers of their own learning, and evoking their own learning (Freire as cited in Vella, 2008). When the mentor initially designed

her mentoring curriculum, the learning activities were largely based on the learning perspective of the mentor. She looked at the commonalities of her experience and her mentee without considering the best learning approached possible. After the first meeting, the mentor realized the weak points of her curriculum. It was rich in information, but definitely missing the input from her mentee. She invited her mentee to review her proposal, and she let her voiced out her opinion. Collaboration then started.

Mentoring is a collaborative teaching. It is evocative. It invites learners to consider their own lives and experience and the potential they dreamed of (Freire as cited in Vella, 2008). The element of collaboration helped the mentor realized that she was not mentoring or teaching a kindergarten kid. She is mentoring a young adult trying to be ready for the corporate world. Her mentee is a young adult trying to understand the pros and cons of conflicts, and she is a young adult trying to accomplish her goals and dreams.

Every mentoring relationship is different. What the mentor learned from the past experience may or may not be applicable to the current one, and this was what the mentor realized on this mentoring project. She has been a mentee and a mentor in the past, and her experiences came both from formal and informal setting. Although her experiences came really handy for this project, Zachary's *The Mentoring Guide* (2012) served it purpose hundred percent. The seven critical elements of the learning-centered mentoring paradigm helped the mentor not only with the design, but most importantly on the content and approach of this project. The seven critical elements are (1) reciprocity – mentor and mentee responsibilities and contributions; (2) learning – this is the purpose of mentoring; (3) relationship – it motivates, inspires, and supports learning and development; (4) partnership – it helps establish agreements anchored in trust; (5) collaboration – actively working together to achieve a common goal; (6)

mutually defined goals; and (7) development – providing appropriate support, challenge, and help for the mentee (Zachary, 2012, p. 3).

Self-awareness is another important aspect of a successful mentoring relationship. The mentor is the facilitator of the mentoring program, so it is important that he/she knows her internal compass, her strengths and weaknesses. It is easier to guide and mentor someone if he or she knows his or her true self. It is simple to tell a life story, a crucible, if the mentor knows the root of her/his life story. It is easier to transform knowledge if it is coming from within, if it is a personal knowledge. A personal knowledge is not a matter of the head, but rooted in experience and grounded in deep places in our being (Benner, 2004).

Mentors may or may not be aware of his/her True North yet, but it is important to know the true self, step-by-step. Discovering True North takes a lifetime of commitment and learning (George & Sims, 2007). The best way of finding his or her True North starts from self-awareness or understanding of oneself. Once he or she has the understanding of his or her authentic self, mentoring and leading others will be much easier (George & Sims, 2007).

My Personal Growth

With my past experiences in the mentoring program, I thought I knew everything already when it comes to mentoring relationship. I was totally wrong. Mentoring is a learning process. Every experience and every relationship is different from one another. Based on the experiences I had as a mentee, I remembered having a mentoring curriculum based solely on my mentor's own perspectives. It was not a shared objective, nor a collaborative learning.

My recently concluded mentoring project was a different experience. Even though it was short, and it was required, a strong foundation was easily established. An overarching goal was

recognized, a strong connection was founded, and most importantly, adult education and learning were acknowledge.

The evoking questions, the mutual space that we created for learning, and the respect for individual's perspective really drew us closer together. We allowed ourselves to step outside our defined curriculum. We explored our discussions into something bigger than spreadsheets, accounting terms, and corporate world; and it was not bad at all. Collaborative environment helped both of us to learn from each other. Although we experienced some challenges here and there, we decided to continue what we started. I am delighted that this mentoring project went beyond my expectations; it went beyond the required papers, and it went beyond the required five mentoring sessions.

References

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