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To match or mis-match? The dynamics of mentoring as a route to personal and organisational learning

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Keywords

Mentoring, Mentors, Learning, Values

Abstract

This article reviews mentoring literature and presents the findings emerging from research into the dynamics of mentoring and how similarities and differences between mentor and mentee influence learning for both parties and the organisation. The principal organisations contributing to the research, Scottish Hydro-Electric and Skipton Building Society, used different approaches to matching mentor and mentee. Theoretical models are developed from the findings that suggest that similarity will support the development of rapport whereas contrasts support learning. However, the importance of personal values should not be ignored.

Introduction

This article summarises the doctoral research work of the author, exploring the dynamics of the mentoring as a route to personal and organisational learning. This research, which is part of an Oxford Brookes University/International Management Centres programme, has been conducted using action research and grounded theory methodologies. Presented here are the findings from 47 semi-structured interviews conducted with mentors and mentees and from 29 questionnaires. The main focus of the work has been the comparison of results from two organisationally driven mentoring initiatives, one at Scottish Hydro-Electric and the other at Skipton Building Society. Conclusions drawn from the analysis so far have led to the early development of further theoretical understanding of the dynamics of the formal mentoring relationship, to the identification of further areas worthy of research and to the prototype design of tools to support mentors and mentees and mentoring scheme organisers.

Extracts from a literature review

The extracts particularly focus on the dynamics of the relationship in terms of similarities and differences and the links between mentoring and learning.

Mentoring and learning

Mumford (1998) stressed the importance of considering the learning purpose (knowledge, skills or insights) when selecting the method of development and suggested that mentoring is less appropriate in terms of skills development because there is a limitation in terms of which skills the mentor can identify. He proposed that

mentoring can be effective in developing knowledge but this will be limited by the knowledge of the mentor, however mentoring was seen as a powerful way of helping the mentee to achieve insights.

Kantor is referenced by Clawson (1985) as arguing that individuals are actually less likely to take steps towards skills development through traditional intervention if they have a good mentor because they will rely more on the relationship. By contrast where a good mentoring relationship does not exist individuals are more likely to take steps towards skills development in order to compensate for weaknesses in the relationship. This is one of the few arguments seen which might be considered to be countering the notion of mentoring as a beneficial process in terms of learning.

In her research study of 24 mentors in teaching or training roles, Bennetts (1995) suggests that what distinguishes the mentoring relationship from other relationships is that in mentoring the primary motive is to do with passing on knowledge, skills and values. She also emphasises the importance of there not being the hindrance of protocols and constraints which throws up the argument of whether such relationships can be engineered. It is the distinction between the acquisition of knowledge, skills and insights which are referenced by Mumford (1998) and Bennetts (1995), which helped inform the researcher in investigating the impact of mentoring in terms of learning.

Another consideration was that different people are likely to gain in different ways from mentoring relationships and this suggested that in researching the benefits in terms of learning there was a need to identify the personal objectives of mentees and mentors, and to consider to what extent their



learning objectives were met. For instance one mentee might be hoping to acquire specific knowledge whereas another might be more interested in achieving insights.

While many writers make broad claims regarding the powerful benefits of mentoring, research relating to the benefits in terms of learning is fairly sparse. It would appear that the real link to learning is far from obvious.

Dynamics of the relationship

Attempting to research the dynamics of successful mentoring relationships is fraught with complexity, not least because of the number of variables involved. Kram (1985) said:

Any two individuals involved in a relationship bring a unique set of needs and concerns that are shaped by their respective life histories.

Stead (1997), in reviewing the Leeds Metropolitan University mentoring study, raised the point that in reality the mentor and mentee relationship is unstable whereas the normative literature presupposes stability. The distinction between mentoring being seen as a relationship rather than an activity was highlighted by Collin (1988) and Bloch (1993).

This perhaps would raise a question over whether there is anything that can be done to devise a formula for successfully managing or creating the right dynamics. Certainly the literature provides opinions suggesting that to manipulate or "engineer" relationships is either extremely difficult or simply not possible (Blunt, 1995; Hofmeyr, 1987).

In considering the nature of the mentoring relationship, it is essential to recognise that the relationship does not exist in a vacuum. In other words, the relationship will be influenced by context. Kram (1985) emphasised that the organisational context is an important influencing factor. She pointed to the influence of, for instance, reward systems, appraisal schemes and how hierarchical the organisation is.

As the research interviews progressed an emerging theme was to do with how quickly the relationship developed and this was explored to see if there were any characteristics of relationships where relationships developed faster than others.

Gender as a dynamic in the mentoring relationship was given some detailed consideration by Kram (1985) and a number of issues are raised, such as, how stereotyping is used to reduce uncertainty, how males and females will assume their stereotype role, how role modelling is difficult in cross gender relationships and

how father/daughter roles may be reverted to in order to avoid sexual tension. The significance of environmental context is stressed, in that others may see the relationship as one of intimacy and favouritism.

Kram (1985) also highlighted the fact that level in the hierarchy of the organisation will influence the nature of the relationship, suggesting that if there is a greater distance in the formal structure between the mentor and the protégé then the individual may feel inhibited.

The dynamic of gender in the mentor/mentee relationship is explored as one variable which might influence the effectiveness of the relationship in terms of learning. Similarly, the dynamic of hierarchical distance is considered, in order to try to identify whether there is an optimum level of distance between the mentor and the mentee to support learning.

As far as age is concerned Levinson *et al.* (1978) suggested that an effective mentor is usually older by half a generation, roughly 8-15 years. It was considered that if the age gap is too wide then there is too much psychological distance. Kram and Burke's independent studies are referenced by Mendleson *et al.* (1989) suggesting average age differences tend to be 16-18 years. Kram and Hall (1991) found, to their own surprise, that the early career and late career managers are more likely to provide mentoring to others than mid-career managers. They put this down to the fact that younger, non-established people under 40 are likely to use mentoring others as a way of helping build their own reputation. Those over 50 are likely to provide more intimacy and psychosocial support, as they are less concerned with advancement and are more mature and at one with themselves. They suggest those in their 40s may be more concerned with their own anxieties of mid-life to mentor others, unless the organisation provides some incentive.

Matching

Arguably a key determinant of success in establishing a viable and successful relationship is that of finding a good match. The question which follows from this is, How do we define "good"? and as far as this research is concerned, the focus remains clearly on whether the relationship supports and leads to learning on the part of mentor and mentee.

In the literature a range of approaches is described in matching mentor and mentee. Some organisations will take a very *laissez-faire* approach and allow mentor/mentee

relationships to simply evolve and then offer support to allow the relationship to hopefully flourish. Others will take a very interventionist approach, using certain criteria to match mentor with mentee and the decision regarding pairing is actually taken by the third party, often from Human Resources. Somewhere in between these extremes lies a middle ground, where the third party facilitates the pairing of mentor and mentee by providing support and guidance but allowing the actual decision to be taken by the mentor and mentee.

The IDS (1996) study identified matching as one of the major pitfalls in company mentoring schemes. Chao *et al.* (1992, p. 634) warned that care must be shown in the matching process in formal mentoring programmes:

A current practice of random assignment of protégés to mentors is analogous to blind dates; there would be a small probability that the match would be successful, but more attention to the selection phase would raise this probability above chance levels.

However, despite the recognition of the need to take care when pairing mentor and mentee and the range of approaches taken, it would appear that there is no evidence of a consistently reliable approach. Apart from the literature supporting this view, the same was equally apparent from a working group discussion the researcher was part of at the European Mentoring Centre conference, 1998. No one was actually able to present, with confidence, a method of pairing that was grounded in research and found to be consistently reliable. The closest the group came to consensus regarding matching was the common sense assertion there was a need to ask mentees to articulate their objectives from the relationship and that should be considered when seeking a suitable mentor match.

Sometimes the best intentions of those taking the third party interventionist approach can be rejected. For instance, Linda Holbeche described (in Megginson and Clutterbuck, 1995) how, at Roffey Park in the UK, the attempt to match female mentors and mentees was rejected as patronising by men and insulting to the women. Gaines (1997) refers to how the Transport Research Laboratory used recruitment staff to manage the matching process, presumably because of an assumed better understanding of issues of selection issues than line managers.

In their interviews with HR managers from Hallmark Cards, Texaco Trading and Transportation, Imperial Oil, Shell and a computer company, Forret *et al.* (1996)

revealed that matching ranged from random to structured "dating". It is commented that: Although no systematic research has been performed to determine which method of pairing is best, it is probably safe to assume that using a random matching process will result in a higher percentage of mentoring relationships that might be deemed "unsatisfactory" by both mentor and protégé. Discussions with past and potential participants in a mentoring programme should provide useful input in determining how to pair mentors and protégés (Forret *et al.*, 1996, p. 28).

So again the advice is to take care in matching but without any practical guidelines grounded in research.

Consideration of the style of the mentor and the mentee and their expectations in terms of, for instance, communications and culture were raised as important issues for consideration by Conway (1996). He noted how some people are better able to work with ambiguity than others, how some will come from a culture where leaders are expected to be omniscient and this will affect the mentee's expectations of the mentor. Conway (1998) was rather dismissive of attempts to systematise the matching process, including the use of learning styles, and he suggested that it is more appropriate to treat each case on an individual basis. He argued that what will be appropriate will depend on the needs of the individual concerned.

In considering the options when it comes to matching Hay (1995) identified three factors for consideration:

- 1 Whether to mix or match on factors such as gender, culture, education, background and age.
- 2 The need for support or challenge, recognising that over time we need both. Referring to her own model of different working styles she recognised the danger of too much similarity leading to collusion or comfort and the potential for contrasting styles to lead to learning. However she also noted the danger of too much contrast leading to irreconcilable differences.
- 3 Whether or not the mentor should be a role model, recognising though that the aim should not be to clone particular managerial types.

As with other writers, though, Hay (1995) identified the options and possible outcomes but did not really suggest anything more definitive than the need to be aware of the process one is using in matching and to at least decide some criteria.

Research by Alleman and Newman (1984) and Alleman *et al.* (1984a) in reviewing much

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US-based literature and apparently considering informal mentoring, identifies three possible reasons that are suggested as to why mentors select protégés. Some suggest it is to do with perceived similarity, which reduces uncertainty as both parties are able to supply missing data from their readily available self-schema. Others suggest selection is based on recognition of ability, which will come from the protégé raising his or her own visibility. Or it may be that the mentor has a stereotype of an effective subordinate and the mentee may have a stereotype of the effective leader, which is used to support selection decisions. It is commented how the idea of selection based on contrast or complementary characteristics is only rarely mentioned in the literature. They found that what differentiates mentors from others is what they do, in other words, behaviours rather than innate qualities. Also, in making one of the few comments found regarding the selection of mentees, it is suggested that they should be selected on the basis of their talent and potential, eagerness to learn and willingness to participate in mentoring. It should be noted though that there is a US theme of advancement and sponsorship running through these recommendations.

This literature confirmed the value in developing guidance that might assist the development of effective mentoring relationships. One might reasonably expect to be able to develop behaviours and competencies through intervention rather than develop or change innate personality related qualities.

Some discussion of how learning styles might influence the effectiveness of the pairing between mentor and mentee is now provided. Of particular relevance to the focus on management learning and the interest in the dynamics of mentoring which underlies this research, is the work of Honey and Mumford (1982) and Mumford (1995a, b, c, 1996, 1997) in the area of learning styles. A major contribution of these authors has been to provide a widely-used model of learning styles and an associated diagnostic instrument. Building on the work of Kolb, the Honey and Mumford model suggested four styles of learning: activist, reflector, theorist and pragmatist. It was suggested that managers have preferences for certain approaches to learning over and above others, in other words a preferred learning style. Mumford (1995a) proposed that the preferred learning style of the mentor and mentee are worthy of consideration when matching and will influence the dynamics of the relationship. It was suggested, for

instance, that pragmatists will be interested in learning opportunities relevant to their job whereas a theorist mentor could be more generalist in discussion. Essentially, mentoring was seen as guiding the learner through a process of reflection and as such, activists might not make the best mentors, as they will prefer to leap in with their own solutions. Mumford (1995a) suggested the mentor and learner should be introduced to the learning cycle and learning styles. He recognised that differences in style between mentor and mentee could provide strength in the relationship as far as learning is concerned but this calls for tolerance and he reluctantly concluded that matching based on similarity was more likely to work.

There was some discussion of learning styles by Hay (1995) and in summary she suggested:

- Activist mentees may be too impatient.
- Reflector mentees will want time to review their experiences but may hold back from moving on or making decisions about action.
- Theorists will want to learn new frameworks and theories, as well as wanting to teach the mentor, but may be over analytical.
- Pragmatists generate lots of practical ideas but might expect too much from the mentor by way of solutions.

Hay (1995) does not actually provide any research evidence though regarding the effectiveness of the combination of learning styles covered by mentor and mentee. While her suggestions, as outlined above, do seem to have face value at a common sense level, it should be noted that Honey and Mumford (1982) do not suggest the individual can be characterised by one style alone.

The researcher recognised that the subject of similarities and differences in terms of learning styles and how this influences the mentoring relationship was worthy of further research. It was opportune that the two main organisations participating in the research, Scottish Hydro-Electric and Skipton Building Society, had matched mentor and mentee using different criteria, namely similarity and contrast in learning style respectively.

In summary, from the literature concerning the matching process and the dynamics of the relationship, the researcher recognised that a major challenge was presented. This was to research the dynamics of mentoring relationships in relation to learning, with the aim of identifying at least some ground rules that would assist

organisations in pairing mentor with mentee.

Summary

There have been valuable contributions in the literature in the areas of defining mentoring and in considering the qualities of an effective mentor. Also, much has been written about the outcomes of mentoring for the individual, albeit with more emphasis on mentee than mentor outcomes. There would appear to be little systematic research though regarding the impact of mentoring on learning for mentee, mentor and the organisation. Equally there is little research regarding the impact of the dynamics of mentoring, in terms of individual similarities and differences, upon learning.

So the six research questions which were explored through the action research interventions are summarised as follows:

- 1 How for the sake of the research should mentoring relationships be defined?
- 2 How does the mentoring process and relationship contribute to learning in terms of knowledge, skills and insights, for the mentee?
- 3 In what way does the organisation benefit from individual learning which occurs as a result of the mentoring relationship?
- 4 How does the mentoring process and relationship contribute to learning in terms of knowledge, skills and insights, for the mentor?
- 5 What are the critical competencies required on the part of the mentor in order to support the learning of the mentee?
- 6 How do similarities and differences between the mentor and mentee influence the effectiveness of the relationship in terms of learning for both parties?

The findings related to questions 2, 3, 4 and 6 are discussed in this paper.

Key findings

The following section shows the findings from semi-structured interviews and Dynamics of Mentoring questionnaires completed by the participants shown in Table I and Table II.

How does the mentoring process and relationship contribute to learning in terms of knowledge, skills and insights, for the mentee?

The evidence from this research suggests the real power of mentoring is in the

Table I

Mentor and mentee “Dynamics of Mentoring” questionnaires returned

	Mentors	Mentees
Male	11	12
Female	3	3
Total	14	15

development of insights. One should not ignore knowledge though because the effective mentor allows the mentee to take knowledge and turn it into insight.

Mentoring does lead to skills development but it depends on extent to which the mentor takes on a “coaching” role compared to the other roles of counsellor, networker and facilitator as described by Clutterbuck (1993). The results here confirm the suggestion of Mumford (1998) that mentoring can be a powerful way of developing mentee insights.

The findings do not support the views of Kantor, referenced in Clawson (1985) that where there is a good mentoring relationship the individual is less likely to take steps towards skills development through training interventions. It would appear that the organisational climate in terms of supporting learning through mentoring, coaching and training interventions is more important.

Also the extent to which there is coaching will depend on the nature of the mentoring relationship. Hay’s (1995) definitions of different types of mentoring relationship are helpful here. Her definitions of traditional mentoring, where the older mentor supports the early career development of the mentee, and the master/apprentice model fit quite well with the Scottish Hydro-Electric and Skipton Building Society schemes.

Mentoring appears to support the development in the mentee of certain behaviours and qualities that do not conveniently fit into the knowledge, skills and insights categories. These might be considered difficult to tackle through traditional off-job training courses and include such behaviours and qualities as risk-taking, action-orientation, self-belief and confidence.

The findings present a challenge to Clawson’s (1985) comment that one should pay more attention to line management relationships rather than being so concerned with the mentoring relationship. It was seen with one very powerful example how the effective mentor was able to support the mentee in managing a difficult issue regarding the line manager relationship. In this case the mentee was in an awkward position of having to confront the fact the line

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Table II

Semi-structured interviews conducted with mentors and mentees

	Mentors	Mentees
Scottish Hydro-Electric: follow-up interviews		
Male	7	7
Female	*2	2
Total	9	9
Skipton Building Society: middle management group, independent Interviews		
Male	**7	4
Female	0	6
Total	7	10
Skipton Building Society: accelerate to management group, independent Interviews		
Male	5	1
Female	1	5
Total	6	6
Overall total	22	25

Notes: *Inc. one mentor to two mentees; **Inc. one mentor to two mentees

manager was asking her to do something considered unethical.

Finally, it is worth noting that the development of knowledge and skills through mentoring is more easy to plan for than the development of insights. Knowledge and skills are more straightforward to define and more objective, observable and testable than insights. Insights begin more with the individual, emerge for the individual, assisted by the effective mentor, and are more personal. The development of insights is less plannable; whether or not they emerge will depend on the real-life circumstances and experiences of the mentee and the extent to which the mentor can assist the mentee to make the connection between experience and him or herself.

Emerging theoretical models

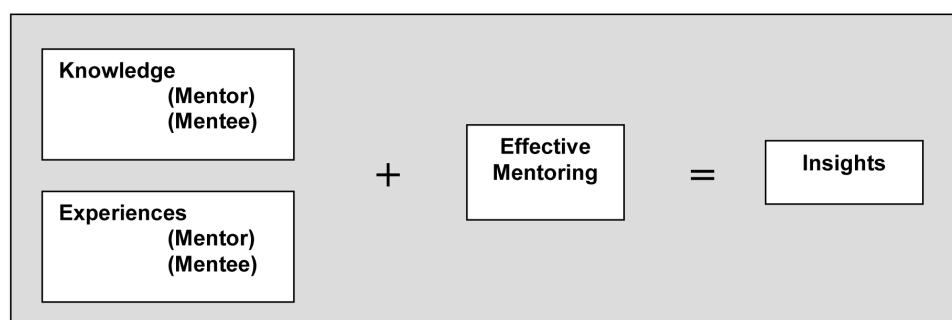
The following formula (see Figure 1) is proposed as a way of understanding the way

in which the mentee can develop insights from the mentoring relationship. Effective mentors will help mentees to access their own bank of knowledge and experience and will open up access to the mentor's previously acquired knowledge and experience. Furthermore, the effective mentor will help the mentee to identify current or potential experience based opportunities to develop insights.

In Figure 2 it is shown that the effective mentoring experience provides various windows of opportunity for the development of insights. Through the top left window the mentee is able to access the views and experiences of the mentor. Through the top right window there is access to the workings of the organisation which the mentor may provide by discussing activities and strategies being addressed at a senior level. Through the bottom right window there is access to the workings of senior managers. This is slightly different to the top right

Figure 1

Formula for the development of mentee insights



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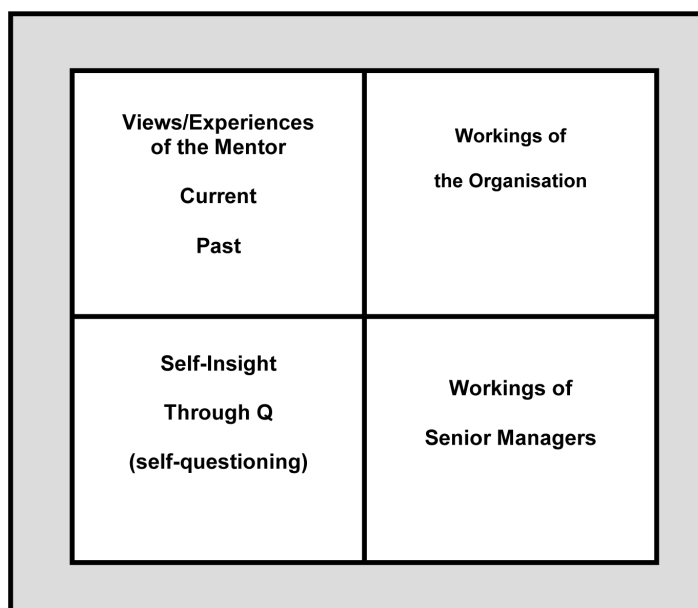
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window in that this is where the mentee gains an understanding of the politics and inter-personal dynamics of senior level personnel. Finally through the bottom left window the mentee achieves a level of self-insight through what is described as “Q”, or questioning, in this case “self-questioning”. For example, the mentee may be confronted with thinking through or re-thinking his or her approach to career development, to relationships with others, or to personal abilities and potential.

Recommendations and key findings

- 1 Knowledge acquisition might be helped by the mentoring relationship and may be easier to plan for. It is arguably less powerful in terms of personal learning. By comparison the development of insights is a more personal and powerful learning achievement, however this is less ‘plannable’ and more dependent on circumstances and the dynamics of the relationship.
- 2 Mentoring might be seen as providing the ‘missing link’ between skills that can be developed through training and implementation because it helps address some of the blocks to change such as self-belief, action orientation and risk taking. Mentoring may help ensure skills development is transferred to the job and sustainable.
- 3 Mentoring may help the development of confidence on the part of the mentee and this may result in more sustained changes than say increased confidence achieved through say a short training course alone.
- 4 The organisation could help the mentor to support the mentee in turning knowledge into insights by explaining the difference between the two levels of learning.
- 5 Mentors could explore specifically with mentees how their learning is translating into action, either through discussion with the mentee or by seeking evidence through other sources (with permission of the mentee).
- 6 Where the culture of the organisation allows, it is useful if the mentor can take a proactive role in supporting mentee development outside of the mentoring meetings.
- 7 Where a trusting mentoring relationship exists, the mentee may be able to draw on the mentor for support when there are difficulties between the mentee and the line manager.
- 8 Mentoring provides a powerful vehicle for discussing inter-personal relationships, including the mentee’s relationship with his or her line manager.
- 9 It may be beneficial to seek evidence of informal mentoring relationships, with a view to supporting these rather than simply relying on the formal mentoring approach.

Figure 2
 Windows of insight through mentoring



In what way does the organisation benefit from individual learning which occurs as a result of the mentoring relationship?

Unravelling whether a benefit coming from mentoring is more of an organisational or individual one, is impossible because often the two are inextricably linked and there are some cases where the individual benefits will naturally be seen as also constituting an organisational benefit. However, there are from this research some examples of what might be considered organisational benefits of mentoring that support some of the claims of others, as discussed in the literature. Also there are some findings that contrast with the findings or experiences of other researchers and organisations.

Lunding *et al.*'s (1978) experience at Jewel was that mentoring supported challenging upwards and this is also seen in the findings from this research. If not overtly mentioning challenging, certainly several mentees, particularly at Skipton Building Society, said they felt more comfortable with approaching

senior managers and it had opened up upward communication.

There was also evidence to support the findings of Forret *et al.* (1996) that mentoring provides access to careers advice. More than this, mentees in some cases said that the relationship had helped them to realise the importance of managing their own career in a proactive way. This could be considered as a deeper insight than simply gaining advice about a potential career path.

There was also much evidence of mentoring helping with developing an appreciation of the company culture and feeling of support as found by Forret *et al.* (1996) and the IDS study (1996).

Regarding the subject of the link with retention, the IDS study had suggested links but recognised these were inconclusive, whereas Alleman (1989) presented strong evidence in one scheme of a link between mentoring and retention. In the research presented here, there were indeed some examples of cases at Skipton Building Society where it was considered that the effectiveness of the mentoring relationship led to retention of the mentee, who may otherwise have considered moving job. It should also be noted though, that in other cases at Scottish Hydro-Electric, mentoring contributed to the mentee's decision to leave. In some cases this was stated by the mentee as due to the failure of the organisation to meet raised expectations, and in others it was due to a realisation that there was not a good fit between the individual and the organisation.

It would be wrong to make a definitive statement about mentoring leading to improved motivation, as there are so many variables that influence motivation. Also there were examples at Scottish Hydro-Electric of some mentees saying that mentoring had contributed to de-motivation, due to the fact the organisation was unable to meet their expectations. In these cases, this might have been prevented had the individuals realised the overall purpose of the mentoring scheme, which was not primarily focused on career advancement and sponsorship.

There was support for the findings of Conway (1996) at London Borough of Brent that mentoring improves the awareness of each other's role on the part of the mentor and mentee, and for the findings of Coley (1996) who found that at Apple Computers, mentoring helped in developing business awareness, improved communications across functions and understanding of the challenges faced by the organisation's leaders. Also, in the cases of Scottish Hydro-

Electric and Skipton Building Society, there was evidence of improved understanding of the informal structures and the culture of the organisation, as seen in the Bass scheme and improved communication as reported from Prudential (IDS, 1996).

Recommendations and key findings

- 1 Organisational learning and benefits are difficult to quantify, however organisations would gain from clearly stating the corporate objectives and seeking to assess progress against these goals.
- 2 It is important to manage the expectations of mentees appropriately when setting up mentoring. There is a need to integrate other development processes, such as career development planning, training, succession planning and systems with mentoring.
- 3 Successful mentoring schemes, set up at the right time in the organisation's development, may support the improvement of upward and downward communication. Mentoring can open up communication in many directions: upwards as mentees become more comfortable communicating with seniors, downwards and across the organisation as mentors improve their awareness of different parts of the organisation and across the organisation where mentees and mentors come together for group reviews.
- 4 Mentoring relationships, if trusting and open, can help address problems between the mentee and the line manager.
- 5 Mentoring can help retention of key personnel through both the specific support given and the demonstration of commitment from a senior level.
- 6 Mentoring can support the development of key skills throughout the organisation, particularly where the mentor takes on a coaching role as part of mentoring.

How does the mentoring process and relationship contribute to learning in terms of knowledge, skills and insights, for the mentor?

Several writers have suggested mentoring helps meet the mentors' needs for generativity (Levinson *et al.*, 1978; Scandura *et al.*, 1996). However, in this research there is limited evidence of this. In most cases when mentors were asked about their objectives in entering the relationship, the answer was either that they did not have any, or they made somewhat bland "motherhood"

statements, such as wanting to help the organisation's effort. In most cases it might be considered that mentors were still in the prime of their own career, or had further potential to achieve, and given the fact that the organisation was driving the mentoring initiative, the generativity argument is weak. A small minority of mentors referred to their satisfaction in being able to pass on their wisdom to younger members of the organisation. So it may be that the generativity motive on the part of the mentor is stronger in informal or unassigned relationships, where the mentor falls more naturally into a mentoring relationship of his or her choice. Perhaps more appropriate in the case of the organisationally-driven mentoring relationships studied in this research would be the concept of social exchange theory, whereby the mentor partakes, knowing that there is likely to be some benefit in return. Such benefits might be, for instance, being seen as supportive of organisational initiatives and being recognised as a mentoring manager.

Mentoring clearly can provide learning opportunities for the mentor and this is a point stressed by Clutterbuck (1993). Overall there was evidence of learning on the part of the mentor but one could not help but think there were missed opportunities too. The learning benefits that were described by the mentor fall into the following broad categories:

- Reflection on their own development needs, prompted by encouraging the mentee to address the same issue.
- Refreshment of their own skills through having to coach or guide the mentee.
- Appreciation of the role of the mentee and his or her part of the business.
- Development of their own style of management through experimentation in the role of mentor.
- Insight into how they were perceived by others in the business.

An interesting comment was made by one mentor who felt that too much openness with the mentee regarding his own development needs and learning might lead to him losing respect. This suggests the individual placed much importance on being seen as an authority figure, with a degree of "power distance", as described by Hofstede (1991). It also suggests that the extent to which this individual was able to learn, through, for instance, discussion and feedback from the mentee, was restricted due to an unwillingness or inability to self-disclose. It is the process of self-disclosure, which leads to reciprocation on the part of the other

party. This leads to more open communication, giving and receiving of feedback, development of trust and learning as the individuals move towards the achievement of their potential (Hale and Whiltam, 1999).

Recommendations and key findings

- 1 There is potential for organisations to focus more attention on the learning objectives and outcomes of the mentor.
- 2 Convening mentors to discuss their experiences could provide valuable support.
- 3 It may help the mentee if the mentor is able to describe his/her own objectives and what he/she is gaining from the relationship, however this calls for a level of openness and disclosure on the part of the mentor.
- 4 Mentors may gain insights into their own line management style through the experience of mentoring. Mentoring provides mentors with the opportunity to develop a "mentoring" style of management.
- 5 Mentoring can refresh management skills by raising awareness of prior learning.
- 6 It may help both mentor and mentee for mentors to discuss their own learning with the mentee. The mentor may gain from reflecting on and articulating personal learning, and for the mentee such openness may build trust and rapport. However, willingness to do this may be influenced by willingness on the part of the mentor to disclose in what may be seen as a senior role compared to the mentee.

How do similarities and differences between the mentor and mentee influence the effectiveness of the relationship in terms of learning for both parties?

In both organisations, job movement was frequent and, as posited by Kram (1985), it could be seen that the cultivation stage of the relationship was reached quicker than her suggested norm of two to five years. Also, as the organisations studied had established formal or assigned mentoring relationships as part of an organisational scheme, it might be expected that there was a focus on developing the relationship quicker, yet a realistic expectation that the depth of the relationship will be shallower than the best of the informal relationships, as researched by, for instance, Kram (1985) and Levinson *et al.* (1978).

As far as developing the relationship successfully is concerned, the challenge for organisations seems to be to ensure that there is a match in terms of similar values and belief structures on the part of mentor and mentee. If there was a way of assessing such characteristics prior to matching mentor and mentee, this could help improve the chances of a obtaining a sustainable match.

Kram's observations that the extent to which the culture of the organisation encourages self-disclosure and openness and the importance of relationships are relevant. Where mentors and mentees engaged in self-disclosure, this helped in the development of trust, whereas lack of disclosure led to more superficial and less personal relationships.

The various concerns of Kram regarding the nature of cross-gender relationships were not, however, supported. She said males and females revert to stereotype roles and that others may see the relationship as one of intimacy and favouritism. These concerns were not borne out in this research and this may have been helped by the fact that the relationships were formally assigned as part of an organisation-wide mentoring initiative.

Kram's concern that hierarchy can inhibit the mentee was given some credence by those who were matched with mentors more than one level up describing their apprehension at first. However, the evidence suggests with careful handling and sensitivity on the part of the mentor, this can be overcome.

Age would appear, from this research, to be less of an issue than suggested by Levinson *et al.* (1978) and Mendleson *et al.* (1989). Overall, mentees seem more concerned that they should respect the mentor for his or her achievement and experience rather than age per se constituting a criterion for judgement. It should be noted though that the participants, by and large, came from achievement-oriented rather than ascriptive cultures, as defined by Trompenaars (1993) where value is given to people's experience. This might be different in more ascriptive cultures where value is ascribed to others based on age, which is usually correlated with status.

There is support for the views of Hay (1995) that too much similarity of working style may lead to comfort rather than learning challenge but that too much contrast can lead to irreconcilable differences. In the cases in the research where individuals felt there was too much contrast in values and beliefs, one party would simply allow the relationship to falter rather than confronting the other party.

Proposed theoretical models

It is proposed that when seeking to match mentor and mentee, it is helpful to consider similarities and differences across a range of criteria. Clearly an overriding consideration will be "What are the objectives in setting up the mentoring relationship?" If the aim is primarily to facilitate learning for the mentee, then different criteria may be identified than, for instance, if an important objective is to facilitate mentor learning. Also it will be necessary to consider whether the mentee is ready and willing to work with a more challenging and confronting mentor who may be quite different in style, or whether a more comfortable but less challenging relationship is appropriate.

Having said all of this, the models below shows the impact of similarities and differences as identified through the research. It can be seen in Figure 3 that if the aim is to speed the development of the relationship, then an important consideration will be to seek similarities in terms of, for instance interests, academic or professional background or even family circumstances. Mentees in the research were quite clear in stating that these factors helped speed the development of rapport and trust.

In Figure 4 it is shown that if the aim is to optimise learning for the mentee and possibly the mentor, then there is a need to look for contrasts in terms of, for instance, behavioural style, learning style, strengths and development needs. However, one should seek some similarity in terms of overall values, beliefs and life-goals. The research showed clearly that where relationships failed most dramatically in terms of learning and sustainability, this was attributed by both mentors and mentees to fundamental differences at this level.

Recommendations and key findings

- 1 When matching mentor and mentee if possible seek to understand some of the fundamental values of both parties to ensure there is no obvious clash as this is likely to hinder the relationship.
- 2 Mentoring relationships where the mentor is one level up from the mentee are likely to lead to quicker development. Where the mentor is more than one level up, more time should be made available for developing rapport.
- 3 Considering development needs of the mentee and the matching with mentors who have strengths in the relevant area may help.

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- 4 Understanding learning styles and using the model of learning style preferences may be more important than seeking a match or contrast based on profiles.
- 5 Mentors and mentees should be encouraged to discuss similarities in experience and style early on in the relationship in order to encourage rapport building.
- 6 If mentoring is set up in a climate of supposed meritocracy then mentors with incompatible attitudes should not be matched with ambitious mentees.
- 7 Views regarding gender of mentor and mentee vary and may be dependent on personal preference and influenced by personal experiences and culture. Mentees, rather than mentors are likely to have differing personal preferences regarding the gender of the other party.
- 8 Whereas some researchers have suggested a need for a certain age difference, it appears experience is actually more important. It may be that gaining experience is less dependent on age than it has been in the past.
- 9 Leaving too much onus on the mentee to set up meetings may not work where there is a difference in levels.
- 10 Similarities in social style may help in building rapport and similarity in basic values may make the relationship sustainable. However too much similarity of approach and viewpoint may not support learning. Also similarity may lead to informality which may lead to lack of structure in mentoring meetings. Further consideration should be given to the dimensions of style and values and the impact of these on factors on learning.

Figure 3

Speeding the development of the relationship

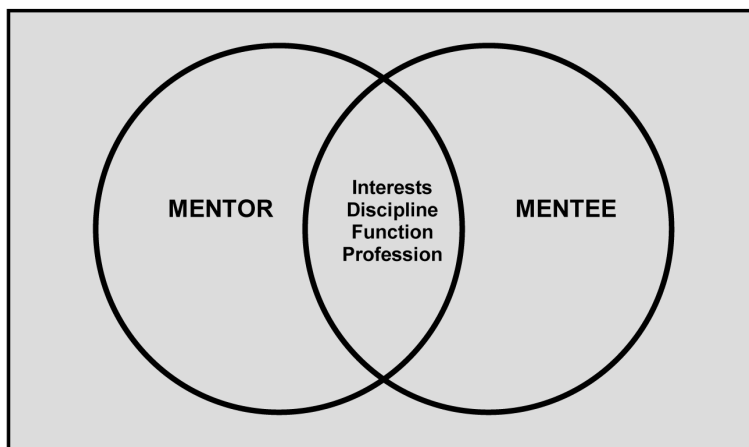
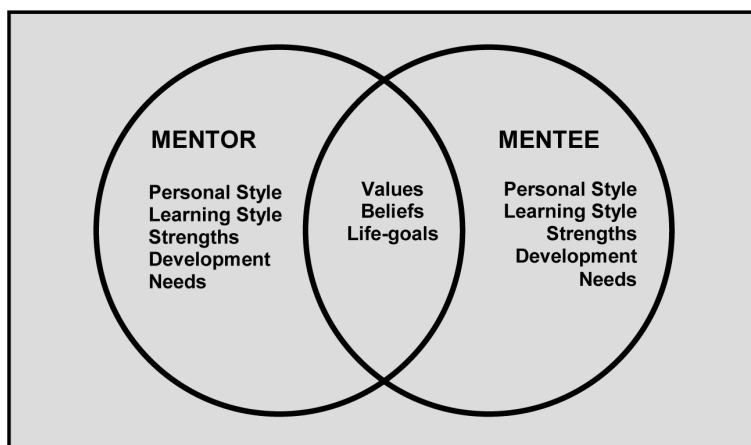


Figure 4

Optimising learning



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