The International Training Programme's Mentor Handbook

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1. Introduction

1.1 What is Mentoring?

"Mentoring is to support and encourage people to manage their own learning in order that they may maximise their potential, develop their skills, improve their performance and become the person they want to be." Eric Parsloe, The Oxford School of Coaching & Mentoring

1.2 Why Mentor?

Mentoring has a number of benefits not only for the mentee, but for the mentor as well. Mentoring can help you reflect upon your approach to your profession, goals, and personal life. It allows you to identify your shortcomings and strengths in each aspect of your life. Mentoring can help improve your skills by teaching them to someone else. It can help you learn about team management, determine what motivates people, and what methods help people work best. It can expand your network and teach you about other people's backgrounds, cultures and interests.

Mentees become motivated by their mentors, get their mentor's perspective on issues they face, and develop new skills thanks to their mentors. In the case of the ITP, the new attendees can be better prepared for the programme, be more confident, and know the expectations and deliverables. In terms of the existing ITP network, mentors can promote collaborations and partnerships amongst past participants.

Furthermore, mentoring helps entire organizations. First of all, it draws upon the resources the organization already has. It provides training to those that need it, increase internal communication, identify its strengths and weaknesses, create new partnerships, and set higher standards for success.

1.3 The Mentoring Approach

Although the mentoring relationship is hierarchical, this does not imply that mentors will have all of the answers for their mentee's questions. Mentors have to remember to guide the mentee into choosing a solution they are comfortable with or to the right person who knows the answer, since mentees are the ones who need to solve their issues. Mentors should question and listen to their mentees to have a clear picture of the background and people involved. Mentors are also encouraged to share their past experiences, but not expect that all situations will be solved in the same manner. It is recommended that mentors keep in touch and updated about their mentee's career, life, and about any issues they have had.

1.4 The ITP Mentor

Roles and Duties:

1. Help attendees with the ITP experience:
    a. Give guidance and advice to attendees to prepare for the ITP
    b. Guide ITP attendees through the Visa process for the U.K.
    c. Check-in with all attendees from your region

   d. Become a liaison between the ITP team and participants
   e. Be available for any counsel needed through the ITP
2. Strengthen the ITP network:
   a. Organize regional meetings so that ITP participants from different years can meet and collaborate
   b. Connect past participants to each other
   c. Provide to colleagues from your region
   d. Remind all of the regional ITP participants to apply to opportunities and contribute to the newsletter
3. Promote the ITP in their home regions:
   a. Reach out to nearby institutions to identify potential ITP participants
   b. Present in nearby institutions about the ITP and the related exhibitions and projects
4. Cascade training:
   a. Develop and give training at home or nearby institutions based on experience with the ITP
5. Reporting:
   a. Mentors should send the created training materials (slides, handbooks or recordings) back to the ITP staff

NOT part of the duties:

- Discuss complaints about the ITP itself (those should be directed towards the staff running the programme)
- Find the people to attend the ITP (they can only connect potential participants to the ITP staff)
- Speaking on behalf of the British Museum or the ITP
- Discussing personal matters with mentees unless previously agreed upon

2. Mentoring Skills

2.0 Building Your Relationship

At some point, you will be meeting your mentee for the first time in person. As they say, first impressions are important! Be sure to introduce yourself and make conversation. A great conversation starter is talking about the ITP, since this is something you have in common. Share some of your background and professional knowledge as well. Let your mentee tell you about himself/herself. The most important thing in this first meeting is to establish a dialogue. Be friendly and make them feel comfortable about asking for advice. You may have already communicated before meeting in person and can easily continue conversations you have started via email or phone.

In your first meeting, you should fill out the mentoring confidentiality agreement (also found in this handbook). This will establish boundaries and communication methods in the relationship. You can always refer back to this document when unsure about certain aspects of the relationship.

2.1 Listening

Listening is a fundamental skill in general, and especially for mentors. It allows them to have a clear idea of their mentees issues, needs, hopes, and fears. Real listening requires complete focus on what the other person is saying. This includes refraining from doing other things, maintaining eye contact and not thinking about what to say next. Giving supportive feedback, like nods or smiles is important to encourage the talker. A technique commonly used to improve communication is summarising. Summarising the other person's points (after they have spoken) can help to keep the conversation on track, and ensure understanding between the people involved.

2.2 Questioning

Questioning is a vital feature of mentoring for two reasons: it can clarify an issue and its background, and it can help to determine what the person involved wants and how they can obtain it. While questioning may seem something that happens naturally, the right type of questions must be asked to obtain helpful answers, and in the right sequence. The usual method of dealing with an issue is:

- Clarify
- Define the Outcome
- Explore the Options
- Decide on Actions
- Review

Remember that although there are a few examples listed in here, questions should be focussed on an issue, and its details. There may be times when the conversation is not moving forward so a possible solution to that is trying to find common ground, either through shared ITP experiences, or another similar topic.

2.2.1 Clarify

Different situations and issues have their own backgrounds and people involved. To be able to really help anyone, a mentor has to know the background on the issue. The first step is clarification. Here is a list of suggested questions:

- What is the issue?
- How is it impacting you?
- What have you tried?
- How did that fare?
- Who is involved? What are they like?
- What do they want?

2.2.2 Define the Outcome

The second step in dealing with an issue is defining the outcome. This involves getting the person to tell you what outcome they want to see. These type of questions questions are useful for gauging that:

- What do you want to get out of the situation?
- How much time will it take?
- What can other people get?
- Can you both obtain what you want?
- What can you learn from the experience?

2.2.3 Explore the Options

When the background and outcomes are known, mentors can make their mentees brainstorm about the options they have for reaching their goal, and the challenges and risks involved in each one:

- How much control do you have over the situation?
- Can you reach out to anyone?
- What options do you have?
- What are the pros and cons of each?
- Do you have any risks?
- How will they affect the people around you?
- How do you feel about each option?
- Have you ever been in a similar situation? What did you do?

2.2.4 Decide on Actions

Once the options have been analysed and discussed, mentees will usually have a preference. However, solving an issue requires action, and it is usually helpful to have a plan to deal with something:

- What will you do?
- When?
- If that doesn't work, what will happen?
- Do you need help from me? From someone else?

2.2.5 Review

Finally, after a problem has been addressed, or while it is being addressed, reviewing the situation can be really useful in order to learn, reflect, and improve for the future. This can be done by asking:

- What worked? What did not?
- What could you do next time?
- Did you expect it to turn out this way?
- Can you change anything about it?
- Can this be a stepping-stone for something else?

2.3 Supporting

Beyond listening and questioning, it is important to act as a support system. As a mentor, you are a role-model to your mentee. Your experiences will serve as great lessons. Knowing how someone dealt with a situation can inspire mentees to solve their own problems. Once you have discussed a problem with your mentee, always follow up to see how they resolved it. Offering support after they solve their problem will show interest and allow mentees to critically assess their handling of the situation.

Another key aspect of supporting your mentee is honesty. Your mentee is coming to you for advice, it won't benefit them if your advice is false. Trust your instincts and guide your mentee truthfully, and remember that you are not supposed to be the source for all the answers. One way to do this is to share a story. Maybe you have direct experience with a situation, and your personal story of dealing with the problem can be a helpful and honest way to give advice.

2.4 Mentor Role Playing

Practice your mentoring skills by acting out these scenarios. Have one person act as the mentor, another as the mentee, and an observer. Use what you just read to guide you, but remember that each problem and each mentee is unique, so each solution will be different.

Scenario 1:
You and your mentee have been getting along great since you have been matched and have kept in constant communication. They are the first from their museum to be going to the ITP and seem excited to go. However, you have received some information from Emma and Claire that they haven't been completing some of their pre-departure work and haven't been keeping in contact with both of them. How do you approach this situation?

Scenario 2:
Your mentee has been in London for one week. They have been actively participating in all the activities of the ITP and seem to be enjoying their time. But the workload is now increasing, and they start to become homesick. They approach you with these personal feelings and ask for your advice. How do you handle the situation?

Scenario 3:
You have been matched with your mentee and you're really excited to talk to them. You send

them an email reaching out, and you don’t get a response for two weeks. The response that they send you is brief and states that they think they will need minimal help getting to the ITP. However, Emma and Claire have no idea where your mentee is in the process of getting to England and need your help getting in contact with them. How do you handle the situation?

Scenario 4:
You have just returned home from a conference that lasted a week. You are behind on work at your institution, and you are naturally busy with personal and family life. Your mentee is now at the ITP as you mentee progresses through the ITP, you find that they require more hours of help than you can provide while still maintaining your life at your institution. How do you handle that situation?

Scenario 5:
Following the ITP, you check in on your mentee, making sure that they finish any post-programme work. They respond by saying that while they enjoyed the ITP, they have no interest in finishing any of the work and are not interested in participating in the ITP alumni network, since they feel they got all they could out of the programme. How do you handle the situation?

Scenario 6:
One of the past ITP participants reaches out to you saying they started an exhibition in their museum but they have had too much work and now they are behind schedule for the exhibition. How do you handle the situation?

Scenario 7:
One of the ITP participants reaches out to you explaining they are not satisfied with the partner museum they were assigned to and would like to work with another partner museum that appeals to their interests. How do you handle the situation?

Scenario 8:
One of the past ITP participants reaches out to you saying they want to collaborate with another past participant, but you have different professional interests. How can you help him?

Scenario 9:
One of the past ITP participants reaches out to you saying they got offered a job in another museum which has more prestige and better pay, but it is not focused on what they would like to do. How do you handle the situation?

Scenario 10:
You and your mentee don't get along. Your mentee requests a change of mentor. How would you handle this situation?

Scenario 11:
One of the people from your region is at his partner museum right now. He calls you saying

there is one of the other attendees at that museum who he does not get along with. How do you handle the situation?

Scenario 12:
One of the ITP participants calls you from his partner museum saying he has too much work. He has to prepare the ITP presentation, coordinate an exhibit back home and meet with the people at the partner museum. How do you handle the situation?

2.5 Assertiveness

There are three ways of approaching situations: aggressively, passively (or non-assertively), and assertively. Aggression is characterized by intrusiveness, threats, sarcasm, manipulation, blame, and hostility. Examples of aggressive behavior are the following:

- "This isn't what I asked for. Go and do your job properly!" (Sarcasm)
- "If I don't get it in 5 minutes, I'm leaving" (Threats)
- "That was his fault, I did what he told me to do" (Blame)
- "You heard what I said" (Hostility)

Aggression makes people feel threatened and makes them not want to interact with you. Non-Aggression or passiveness is characterized by inaction, indecision, over apologising, and withdrawal. Phrase examples include:

- "I don't mind, you choose"
- "Any of the options is fine"

The cons of non-assertion are not getting the desired outcome, being taken advantage of, and low self-esteem. Assertion is generally the best approach to communication. It is characterized by fairness, justified actions, sensitivity to others, honesty and clarity. Assertive people have clear goals and needs, and they are not afraid of stating them. They consider the people they are dealing with and look for win-win situations. Examples of assertive statements are:

- "I would like to participate, but I don't think I can unless we have clear objectives"
- "I have something else scheduled for that day, but I hope you can find something else"

Assertion requires analysing and acknowledging your feelings, being clear and specific, asking about people's opinions and clarification, justifying your opinion and being calm. Practice assertion by role playing the following scenarios:

Scenario 13:
You are in a team meeting and a person always rambles on too much about unrelated things. His comments do not contribute to fulfilling the objectives of the meeting. What should you say?

Scenario 14:
A colleague is making too much noise which disrupts your working time. He makes loud phone calls, printing a lot of paperwork, and is shuffling in and out of the room constantly. How would you handle the situation?

Scenario 15:
Your boss is very knowledgeable and interesting. He asks for your help in a lot of projects, which is great for your career. On the other hand, all of those projects take too much extra time out of your schedule and it's beginning to affect your personal life. What would you do?

3. Presentation Skills

Presentations skills are valuable in many ways; they can build confidence, increase your persuasiveness, and help other people learn. Good presenters are often perceived as more respectable and capable. In relation to the ITP, presentation skills can be useful for your mentees that are arriving to the ITP, can help you to advocate for the ITP at other institutions, and be more effective at cascading training.

3.1 General

There are certain characteristics that make presenters great. Confidence lets them focus on the delivery on the presentation and allows the presenter to be perceived as more trustworthy and convincing. Appropriate eye contact with the audience makes them feel a more personal, individual connection. If possible, switch through the audience looking at each person individually. Enthusiasm keeps the audience engaged, and make the presentation delivery more exciting. Good presenters go at a reasonable, understandable pace and keep their body language in control, to avoid distracting the audience. Presenters should brainstorm about possible questions and be prepared to answer them. For group presentations, coordination amongst members is very important, as too many changes in speaker can be distracting. Each member should also focus on a specific aspect of the presentation.

Good presenters also use a variety of presentation strategies. One of the most effective presentation strategies is engaging the audience through questions or stories. Presenters should view themselves as storytellers, and asking questions to the audience can get them actively involved in the presentation, and increase their learning. Stories, if well told, can place the audience in real-life scenarios, make them involved with the story, who will be excited about the developments in the story. When telling stories, cliffhangers and twists can make an even better connection. Furthermore, visual cues can be tied to your story and help frame it, black screens for low points and pictures of the places connected to the story are two options.

Example: When discussing his experience running a startup, the presenter started by showing pictures of the product and of the conferences he attended. Afterwards, he had a black screen, and he started talking about a lawsuit he received which was the end of the company.

Managing presentation time is another important presentation strategy. While many people think of presentations as opportunities to communicate all of the information they have, all that information is usually far too much. Presentations should provide a glimpse onto a subject to make it look attractive or interesting, not discuss every detail about it. Therefore, it is important to make presentations short, clear, and concise such that there is enough time to properly engage the audience with questions and discussion.

A final important presentation strategy is practice. Some people may seem to have been born with a natural presentation skill, but truthfully, there is no substitute for practice. Whether with a friend, alone, with a camera, or in front of the mirror, practice can highlight strengths and weaknesses in presentation delivery, increase confidence, and improve structure. Another form of practicing is with kids; if they actually pay attention to a presentation, it is a good sign. Try each form of practice and choose whatever form works best.

3.2 Presentation Structure

The first step in making a presentation is defining its purpose. Is it to teach people about a certain topic? Is it to make them think about an issue? Is is to talk about a process? Whatever the topic, defining the purpose helps to determine the presentation structure. If it is to teach people, the focus of the presentation will be the material to teach, and the history or background might not be needed. On the other hand, to make an audience think about an issue, it's background can be really helpful.

Once the objective is defined, the key points to deliver must be identified. The number of points must be kept to a minimum so that the audience can follow the presentation. For example in the presentation that is paired to this part of the handbook, the points are: the qualities of a good presenter, the structure of a presentation, powerpoint design, and giving presentation feedback. As a general rule, more than five key points is probably too much. If there are many points to deliver, the points that have priority must be kept. Prioritizing can be done by asking: "What needs to be included for the presentation to be complete?" "If I don't include this, will people understand?" "Does my audience already know this?". These will help to narrow down the most important aspects.

The second step of making a presentation is thinking about the audience. A more knowledgeable audience will need less background and more data. Audiences also can be confused by acronyms, so if any acronyms are used, they should be defined in the start. If possible, avoiding acronyms in general is best. Interaction is much more important and has to be more frequent for young audiences. A larger audience will interact differently than a small one. In smaller audiences, people will more than likely participate in the presentation discussion since they will feel more comfortable engaging with the presenter. Less questions tend to be answered in a larger audience, so polling the audience or asking thought-provoking questions can be more effective than asking specific questions. Thinking about your audience is key to a better delivery.

Visuals are an important aspect of a presentation. Visuals can positively contribute to the presentation, but they can also hinder it. They have to be easily readable and understandable so that they do not distract the audience. Moreover, too many visuals can be confusing. The type of visuals used are important for the story you are trying to tell. Charts and graphs can show data and statistics, diagrams and drawings can explain a process or design, while pictures can help to tell a story.

In general, the structure a presentation follows is: introduction, body, conclusion. Audience engagement will be at its peak at the beginning and end of presentations, so the introduction and conclusion must state the objective and key points to make sure these are communicated. On the other hand, the body had to contain the development of the points and the details involved.

3.2.1 Introduction

The first part of any presentation is the introduction. To begin, it is customary to welcome the audience, introduce oneself, and state the presentation. One way to catch the audience's attention is to begin by asking thought-provoking questions (which are attempted to answer throughout the presentation) or a story (which is connected to the topic).

<u>Example:</u> To introduce a product which checked whether stoves are on, a presenter can tell a story about driving to work on a normal day but having to turn back home thinking he had left his stove on. If he had the product, he could have checked it from his car.

<u>Example:</u> When discussing an exhibition you could begin by focussing on a particular object, for instance a toy. Tell a story about who would have played with it and what playtime was like in that time.

<u>Example:</u> If a presentation is related to a relevant topic in today's world, like immigration or climate change, begin by asking the audience questions about those subjects.

3.2.2 Body

The real content of the presentation is in the body. However, it is important not to have too many points or too much data in it. Visuals and stories are the best way to communicate with the audience while keeping them engaged.

<u>Example:</u> When discussing an exhibition, you could discuss the process of setting it up. Begin by discussing the inspiration behind it, the work needed to organize it, the methods of getting the audience involved, and accompany the story with pictures of the objects in the exhibition.

3.2.3 Conclusion

The final part of a presentation is the conclusion. Restating the objective and key points helps to make the audience remember them. Besides that, thanking the audience and anyone else involved makes presenters be more likeable and approachable. A good way of ending presentations that teach particular skills is to have the attendees apply the techniques learned, as in many mentoring workshops. Another way of ending, in particular related to museum exhibitions is to have replicas for people to handle after the presentation. Ending on a positive note is another technique that makes presentations be more memorable. Even if the matter discussed was in itself a matter of worry or concern, the positive note might leave the audience with a positive experience. If the presentation discussed a failure, the positive note might be the things that were learnt thanks to the failure, or ways in which that failure could still be reverted.

<u>Example:</u> For a presentation about climate change, the conclusion can state that we still have time to change policies and behaviours to avoid any catastrophe. A presentation about an exhibition that could not be completed can discuss the issues that caused that, and how to avoid them for future exhibitions.

3.3 Presentation Design

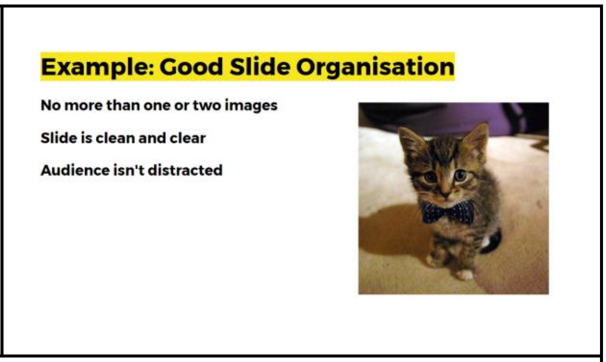
Many presentations delivered orally, however, having slides or accompanying materials helps to deliver presentations. Having a few slides can help the audience be concentrated on the material, while too many slides can be distracting or confusing. Wider or bolder fonts are easier to read that thin ones, and their size must be in proportional to the distance from the audience (but at least 18 pt). Contrasting colors (black and white, green and cream, blue and pale orange) make presentations easier to look at in comparison to colors of similar hue (pale blue and dark blue, red and orange, yellow and white). Colour-blind people cannot distinguish between red and green, avoid having the two together.

Bad Example	Good Example
Readable Fonts:	
This	**This**
Contrasting Colours:	
This	This

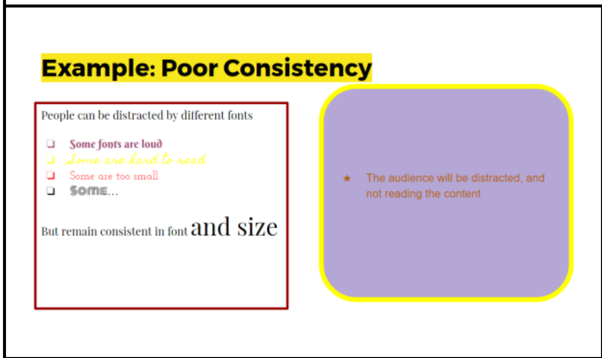
In general, fewer words in a slide are better. More than 30 or 40 is overwhelming and distracting. Focus on writing big picture ideas and explaining the details in person. Remember, what you don't write on the slide, you can explain verbally during the presentation. The organisation of the slides is also important. Since reading is done from left to right, keeping pictures at the right of the slide is a way of making the audience return to it after reading each line. With slides, consistency helps maintain the audience focused on the important information. Consistency includes fonts, font sizes, colours, block sizes, block colours and list organization. Visuals can very helpful to transmit information, but they can easily go wrong. Visuals with unclear data, too much information, small fonts, bad backgrounds or colour choices are not effective.

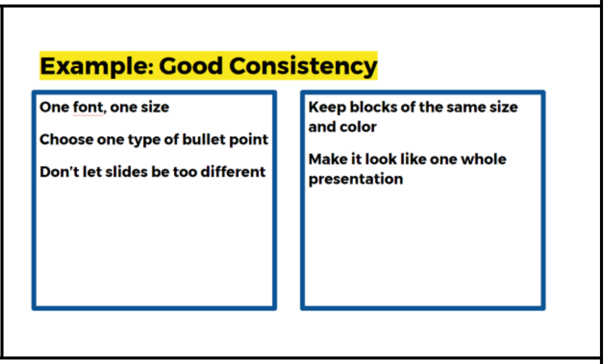
Look at the following examples to illustrate these issues:

Bad Example	Good Example
Word Count:	
Example: Poor Word Count When there are too many words on a PowerPoint slide, the audience is trying to read all of those words on the slide instead of paying attention to the slide. This is a poor example of word count because instead of the points being made on this slide being cut down into manageable pieces, all of the points are being said in a long paragraph. Also, everything that you want to say doesn't need to go on the slide; you can explain things out while leaving a basic outline on the slide of what you are saying.	**Example: Good Word Count** This Is Enough
Organisation:	

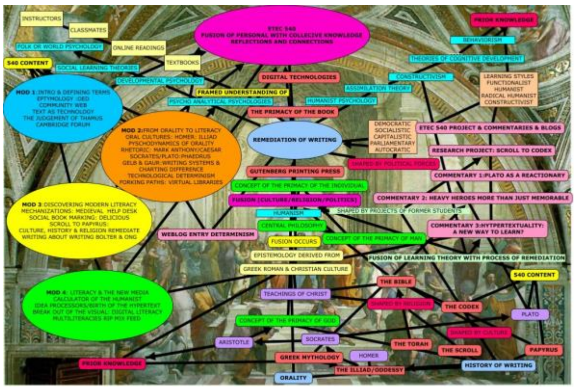


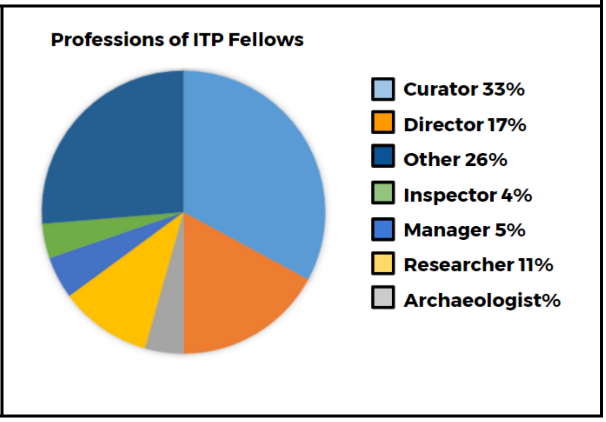
Consistency:





Visuals:





Handouts or other materials to be used during presentations is another way of engaging the audience and is especially helpful for learners who need to experience things first-hand or to have the audience return to the topic once the presentation is over.

Example: In a presentation about fetal development, rice grains, peas, tennis balls and melons can illustrate the size of babies as they grow.

3.4 Feedback

A final important aspect of presentations is giving and receiving feedback. The first thing to take into consideration is to give and receive feedback constructively. When giving feedback, saying “You should speak louder next time” is better than “I can’t hear you”. When receiving feedback, think of criticism as areas of improvement and not personal offences. There is a number of things to consider about a presentation, which can be summarised through the following questions:

- Are their objectives clear?
- Do you understand their presentation?
- Did they make eye contact?
- Were they confident?
- Were they audible?
- Did they face the audience?
- Did they speak at an appropriate pace?
- Was the presentation legible?
- Were the materials attractive?
- Were they enthusiastic?
- Did they give good details and examples?
- Did the presentation follow a logical sequence?

4. Time Management

It is important to have an effective management of time, as it allows for work to be done efficiently. Time management allows for a balance between work life and personal life. We will delve into different techniques to manage time effectively in a work environment.

4.1 Classifying Tasks

One of the most common techniques for time management is to classify tasks by their urgency and importance. Classifying tasks allows for identifying which tasks should be done first. The following classification of tasks is described in Manage Your Time by Tim Hindle:

1. Type A: Tasks of that are high importance <u>and</u> need to be done as soon as possible.
2. Type B: Tasks of that are high importance <u>or</u> that need to be done as soon as possible.
3. Type C: Routine tasks, or tasks of low importance.

After classifying each task, it is important to plan your day in such way that there is a mixture of each of these three types of tasks. It is also important to make sure they are spread out and there are no two consecutive tasks of the same type. This is because two highly demanding tasks can be far too tiring to do in sequence. Remember to be realistic when planning out the day, as setting overambitious expectations can be overwhelming and can cause a lack of productivity.

Throughout the day, there may be times where a new task may appear. It is important to reassess your schedule with the new task in mind. Classifying tasks and planning accordingly may take some time off the day, so remember to assign a time of the day for this. Classifying tasks is one of the most effective ways to manage your time, because it allows for a good pacing of work life in order to avoid any burn-outs.

4.2 General Time Management Tips

Aside from classifying tasks, there are other techniques for time management, which are:

1. Setting frequent reminders of due dates. This is another way to remind yourself of important tasks (type A, type B).
2. Remember, when encountering a new task, it is important to reassess what your priorities are. Priorities can change constantly too.
3. If you feel overwhelmed by the amount of work, take a break and reassess what tasks to focus on and which can be set aside for later.
4. Allocating time of the day for planning is never a waste of time.

4.3 Delegating tasks

There may be times where you find that your schedule is filled with very important and urgent (type A) tasks. In such cases, delegating a task to someone else can be effective in the work environment. However, there are a few things to consider in order to properly delegate a task. It is very important to be clear when communicating what you expect the person to do for you in order to avoid confusion. Setting realistic expectations and deadlines with the aim to prevent conflicts is also important. Finally, keeping a record of what is delegated and its details (who is in charge of doing it, deadlines, etc.) is an effective way of remembering tasks you have delegated.

4.4 Time management activity

As an ITP attendee, it can be hard to manage enough time for work, personal life, and the ITP. The mentor can help by encouraging the use of time management techniques showed in this section. It is also advisable to provide personal experiences where you've had a similar experience in order to provide some guidance on what to do. The following exercise can also be of use to a mentee:

Take 20 minutes to think of two tasks, one you want to complete next week, and one you want to get done over the next year. Fill this chart for both of them:

Short-term task:____

What	**Why**
When	**How**

Long-term task:____

What	**Why**
When	**How**

5. Team Building and Management

A team can be defined as “an interdependent group of people with a common goal”. Some teams are chosen, and some assigned, but in today’s world being able to work in teams is a necessary skill. Different people have different skills, and these can only be properly combined through effective team building. In the case of the ITP, the network of fellows should work as a team, collaborating, meeting, and helping each other. This chapter provides an introduction into team building and management.

5.1 Why Teams Fail

When teams begin to work together, it is hard to define many aspects of teamwork. Many teams begin to work without setting common goals and objectives which can lead to disjointed work and a lack of progress. Not having a strategy can cause delays in teamwork and gaps in objective fulfillment. A lot of teams face conflict due to personality differences or ideological differences. This can be especially true on the ITP, as many different cultures are coming together to work towards a common goal. A lack of a deliberate decision-making system can cause members to be resentful or unhappy with the team’s direction. Unclear roles can lead to repeated work and a decrease in productivity. Other common signs of team failure include missed deadlines and ineffective meetings.

5.2 Team Building Approach

There are five steps to building teams: contracting, data collection, diagnosis, intervention, and evaluation. These are explained in the subsequent sections.

5.2.1 Contracting

Contracting is the process of learning about the team’s background. To properly address issues on a team, you must first know every team member, the expectations for the team (papers to write, presentations to deliver or other tasks) and the ground rules (certain behavior and methods of communication are expected in academia or different organizations).

5.2.2 Data Collection

There are many ways in which data collection can be performed, including conversations, surveys and interviews. The method chosen will depend on team size and convenience (surveys for larger or distant groups; interviews for smaller ones). The data to be gather has to provide insight into the opinions of each team member about teamwork, including role definition, challenges faced, goals, areas of improvement, the decision-making process, and meeting effectiveness. More aspects might be pertinent to data collection for different teams; emailing and a projected timeline are two examples. When collecting data, remember to be clear about the reasons for collecting the data. A way of making sure you understood what was said in a conversation is summarising main points.

5.2.3 Diagnosis

The data collection will hopefully result in highlighting the problems that the team faces. These can be overlapping roles, personality differences, the lack of a decision-making process and many others. The important factor in this step is knowing what the main issue is, and which members need to address it.

5.2.4 Intervention

To address a problem, call for a team meeting. In the meeting, describe the problems that the team has faced and the performance decrease that they have caused. Propose the required solution: a redefinition of roles, setting common goals, and having a decision-making system are a few. Remember to let every member participate and have an opportunity to express their ideas. If conflict arises, be calm, restate that the team has a common goal to achieve, and try to have participation from all parties. There are many team building activities to ease the process, a few can be found at the end of this chapter.

5.2.5 Evaluation

It is important to ensure that the team is functioning properly after the intervention, and there are many ways of doing so. From a management perspective, make sure to keep track of team members and to ask about their feelings and goals. Track their work performance, whether it is writing milestones, goals achieved, or other numbers. Have frequent meetings to ensure that the team maintains a common purpose and that no conflict arises.

5.3 The Four C’s

The four C’s is a way of remembering the key aspects of teamwork: context, composition, competencies, and change. The team context is a broad term to encompass the team’s purpose (e.g. writing a report or developing an exhibition), the cultures involved, and the timeline of the project. Composition refers to the team members, their level of experience, their skills and motivations. The competencies are the abilities to communicate, make decisions, and manage conflict. Change is the way of addressing performance issues. Remembering these four C’s can lead to an effective approach to team management.

5.4 Team Activities and Scenarios

Activity 1:

Have each person in the team state their hopes, fears, and expectations.

Activity 2:

Looking for a quick and easy team building activity? Come up with a series of questions specific to your workplace and test your team’s knowledge. “What color are the kitchen tiles?” “How many people are in the IT department?” “How many windows are there in the entire office?” “What brand are the computer monitors?” “What month of the year is most common for birthdays among our employees?” This is a quick team building activity that tests how observant your team is.
From: https://www.wrike.com/blog/ultimate-guide-team-building-activities/

Activity 3:
Split your group into pairs and have each pair sit back to back. One person gets a picture of a shape or simple image, and the other gets a piece of paper and pen. The person holding the picture gives verbal instructions to their partner on how to draw the shape or image they've been given (without simply telling them what the shape or image is). After a set amount of time, have each set of partners compare their images and see which team drew the most accurate replica.
From: https://www.wrike.com/blog/ultimate-guide-team-building-activities/

Activity 4:
Write a few general work-related topics on a whiteboard or on sticky notes posted to the wall: "My first day," "Teamwork," "Work travel," etc. Gather your team together and have everyone choose one of the topics and share a story from their time with your company to laugh and bond over shared experiences. Or, pass out sticky notes and have everyone write down positive memories of working together or special team accomplishments. They can use words or pictures to record these memories. Then have everyone share their memory and post it on the wall, forming a positive memory cloud.
From: https://www.wrike.com/blog/ultimate-guide-team-building-activities/
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Pair participants into teams, and pose this question: If you could ask just one question to discover a person's suitability for (insert topic here), what would your question be? Say the leader chose to go with a marriage situation. That means each person in a two-person team would come up with one question that would help them discover whether or not their partner was suitable to be married to them. If the topic was babysitting, each team member would have to come up with just one question whose answer would help them determine whether or not the person was suitable to babysit their child. This icebreaking activity can also get mixed up by issuing one situation for the entire group or allocating a different situation to each team member or pair to work on. Depending on the situation chosen, the activity can be very fun, but it can also demonstrate that crucial

Scenario 1:
You have been designing a new exhibition with a few other ITP mentors in your region. It is set to open next week, and your team is starting to disagree about every detail of the project. What do you do?

Scenario 2:
You have proposed setting up a regional conference to advocate for the ITP. Other mentors have expressed interest in this project. You will serve as team leader and organize all meetings. Over time, you find that none of the mentors have time to meet or even Skype to discuss the conference. What do you do?

Scenario 3:

At your home institution, you have been designing a new gallery to house new artifacts found in a recent discovery. You have been working hard and getting along with most of your teammates, yet one person is always disagreeing with your decisions and can be quite rude about it. How do you handle this situation?

6. Cascading Training

The definition of cascading training is the training of individuals who will provide the same training to others. The ITP provides skills and knowledge useful to many heritage professionals, yet not all of them are fortunate enough to attend. As mentors, you should develop training courses for professionals in your region, to teach them about your experiences at the ITP and elsewhere. This chapter outlines the steps required to develop an effective training course: analysing training needs, designing, delivering, and evaluating the course.

Aristotle said “Teaching is the highest art of understanding”. Being able to teach training requires reflection, prioritizing lessons, and establishing methods of communication. It requires deep knowledge of the material itself, the audience, and the ways in which people learn. To be able to teach effectively, know that different people learn in different manners, so it is important to make training a varied and active experience that includes seeing, hearing, discussing, and doing.

6.1 Training Techniques

There are numerous techniques that can make training more effective. Restating the information in simpler words can enable the audience to think about the material in different manners. Summarising can keep the audience engaged with the delivery and ensure they do not forget what has happened, this is why we have daily reviews in the mentor training. Examples are helpful for learners who need real-life comparisons or implementations. Applying the learning to specific scenarios is another way of getting various types of learning involved and can get the audience involved, this is why we have interactive activities and role playing in the mentor training.

Training requires balance of various factors to provide the best experience for the audience. Balancing theory and practice can various types of learners involved. Balancing groups and individual learning can allow a good distribution of time between self-reflection and participation. The balance of discussion and listening can give the audience time to think and avoid exhaustion. Balancing laughter and seriousness can make the audience connect while still controlling the flow of the course. Finally, balancing different training approaches ensures that all types of learners take advantage of the training. The balance of these techniques requires careful planning for the course and the ability to gauge the mood of the audience. Sometimes, it is easy to focus on the content of training and forget about the audience’s reaction, but it is important to remember that the purpose of training is the audience; their lack of participation will make training purposeless.

6.2 Course Development

All training courses have a beginning, a middle and an end. The beginning is the preparation of the course, including a needs assessment, goal setting, and programme design. The middle concerns the delivery of the training, and involves thinking about the details of training: choosing a location, changing the speakers, engaging the audience, and many more. Finally, the end is the discussion and evaluation of the course.

6.2.1 Needs Assessment

To assess the training needs of an organization or a group, it is important to begin by defining important qualities. First of all, the target audience. Knowing your audience helps to narrow down the possible areas of training; for instance, it would be foolish to try to teach gardening to musicians as part of their job. It is also important to determine the level of familiarity the audience has with the subject. A knowledgeable audience can be taught specific details and skills, while a new audience will need a general overview first. This can also be done by finding out whether the audience has received similar training before. If they have done so, it is important to explore the successes and failures of past training courses. This will help to determine which possible areas of training will be useful and know the most effective training methods.

6.2.2 Programme Design

There are three steps to programme design: defining the objective, methods, and formats. Defining the objective is the end of the needs assessment and specific learning goals associated with each training area are determined. The methods are the techniques used to teach something: discussions, presentations, role playing, debates and many other. These techniques are employed to achieve the learning objectives; for instance, practicing presentations is a good manner of teaching presentation skills. Finally, the format concerns the specific details of delivery, these can be audience seating arrangements (in circles, in a u shape, or in a classroom manner) or the details of activity arrangement (pairs, groups, or team competitions).

6.2.3 Delivery

The delivery of training is probably the most important aspect of any training course. One aspect to consider is the order of delivery. While it is generally good to group common themes or objectives at the same time, spreading them throughout the training session gives the audience time to reflect or relax. For instance, during the training mentor week, there are practice presentations over three days to let the audience get used to giving them, but also to give them time to practice and reflect upon their presentations. Another possibility is having an activity before the theory, so that the audience can be more relaxed without having to adhere to the theory.

A few details to keep in mind with delivery are engagement and review. Engagement of the audience, if possible with icebreakers, should be done in the first five minutes, so that the audience feels a personal connection to the training. Frequent reviews help to keep the course on track and gauge audience learning. Giving the audience some free time allows them to relax and avoid exhaustion. Finally, it is important to receive feedback from the audience during the training itself to improve whatever is possible.

6.2.4 Evaluate

There are many ways to evaluate a training course, including discussions, surveys, and reports. These different methods can result in different types of data. Discussions and reports will provide descriptions, while surveys will provide results. Discussions and reports can be used to point out specific flaws or strengths in the course, including depth, techniques or length, while surveys will provide general feedback. A few questions to ask are about the levels of learning and involvement, and favourite and least favourite activities. Evaluating the training course is important to determine success and areas of improvement.

6.2.5 Course End

After the training, there are many tasks to be performed. Setting-up a network and following-up with participants can benefit their continued learning and could result in other opportunities, just like in the ITP. The results of the evaluation have to be taken into account to improve the course for its next iteration, or at least learn from its mistakes. Finally, celebration is often overlooked, yet it sends participants off with a greater sense of achievement and good memories from the course.

6.3 Cascading & the ITP

As part of the mentoring scheme, mentors should develop their own training courses for their own organisations or nearby ones. Start by looking at training needs: has a department been running slowly? Could some professionals learn a new skill? Would people benefit from learning about your ITP experience? Could people learn about your experience with exhibition design or an excavation or a conservation project? If any of these training areas seems worthwhile, investigate past efforts and develop your training course.

7. Stakeholder Management

A stakeholder is any individual, group, or organization that can affect a project in either a positive or negative manner. Management of stakeholders is an integral part of project and professional development. Proper management turns stakeholders into supporters and advocates of a project, which can contribute to its success. In relation to the ITP, techniques related to stakeholder management can be used to organize exhibits and collaborations, or to plan training courses and meetings.

7.1 Stakeholder Identification

The first step in managing stakeholders is identification. Even for small projects, there are often many people affecting and affected. To identify them, it is useful to begin with a list to identify project overseers, partners, participants, and anyone else involved. These can be figured out through questions of the following type:

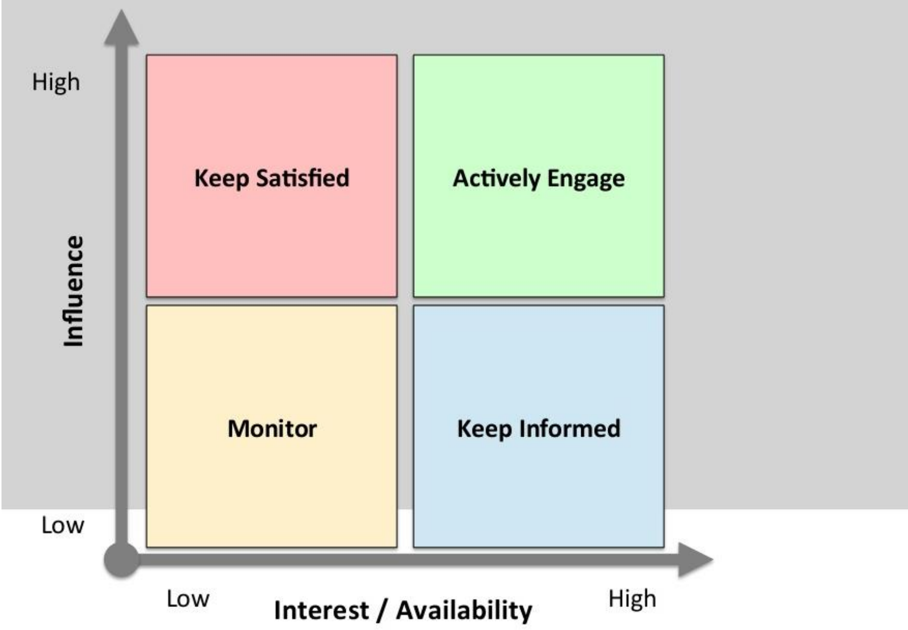
- Who will be impacted during the project?
- Who will be affected by its output?
- Who approves funding?
- Who sets the goals?
- Who approves changes/desings?
- Who will use the output?
- Who will do the work?

There are many more questions that can be added but they vary from project to project.

Example: To develop this mentoring scheme all of the following were involved:

- The ITP Staff
- All of the ITP alumni
- ITP alumni's institutions
- The British Museum
- The U.K. Partners
- The WPI team
- Future ITP attendees
- ITP department representatives

7.2 Stakeholder Mapping



Source: The Stakeholder Management framework for teams, programs and portfolios, Scaled Agile, Inc, 2012

Once a stakeholder list is complete, *mapping* the stakeholders is a technique that can help determine the most effective way of managing these stakeholders. Most professionals map stakeholders by power over the project and interest in the project. At first it may seem hard to determine which category each stakeholder is, and how powerful and interested they are. This will result in four major categories:

- High Power, High Interest (HPHI)
- High Power, Low Interest (HPLI)
- Low Power, High Interest (LPHI)
- Low Power, Low Interest (LPLI)

To have an accurate map of all stakeholders it is important to think about the motivations, interests, and contributions of each particular stakeholder by asking the following questions:

- What financial interest do they have?
- What emotional interest do they have?
- How will the output benefit them?
- What motivated them to participate?
- What is their opinion of your work?
- Who or what influences their opinions?
- What do they control? Funding? Supplies? Participation? Something else?
- If they want you to fail, how will you manage their opposition?

Once this have been answered for each stakeholder, it is useful to map stakeholders by placing each of them in the chart at the start of the section.

The graph states the management style (actively engage, keep satisfies, keep informed, monitor) that goes along best with stakeholders of each kind. HPHI stakeholders should be actively engaged and managed closely through in-person meetings and frequent communications and reports. HPHI stakeholders are the ones which have the greatest impact on projects, so understanding their desires, and ensuring they become supporters of the project can greatly contribute to the success of a project.

HPLI stakeholders are usually authority figures who have a lot of power but do not have the time to be actively engaged in the project. Therefore, HPLI stakeholders have to be kept satisfied, but not need to be actively involved. This means giving status updates about the project, ensuring that the project follows due course (and that the output will be useful), and that the project does not conflict with another.

LPHI stakeholders are generally the stakeholders that will be most directly affected by the outcome, yet they do not actively participate in its' development. These stakeholders are excited about the final product and will therefore want frequent communication about the project, including meetings, calls, emails, postings and reports. LPHI stakeholders are the most likely to become supporters of a project, and give a sense of meaning to the final output, so their contribution and feedback can be a deciding factor in the success of a project.

LPLI stakeholders are often indirectly affected by the result of the project. For example, managers or institutions of participants or partners of the organization are frequently classified as LPLI. These are the least involved type of stakeholder, so they only need to be monitored and informed through general communications. If possible, showing them the benefits of the project, whether learning or development can help to avoid any interference.

7.3 Stakeholder Analysis

There are more techniques to engage and plan the involvement with stakeholders. For example, inviting stakeholders to participate in the project will make them feel more closely involved in a project, its failure will also be their failure, and its success will be their success. Participants in the project will also contribute to brainstorming and defining the project goals. Consultation is a way to get high power stakeholders involved. High Power stakeholders will usually also be knowledgeable and experienced, so their input can steer the project into a better course.

To further determine engagement with stakeholders, a stakeholder analysis can be performed by defining communications, interests, status, desired support, role and actions through the following questions:

- Communications & Actions: How will you communicate? How else will you interact?
- Key Interests & Issues: What do they want?
- Current Status: Do they support you? Help you? Critique you? Block you?
- Desired Support: How much involvement do you need from them? (high, medium or low)
- Desired Project Role: What role will they play? (partner, participant, consultant, other?)
- Desired Actions: What do you need them to do?

To finalize the analysis these can be completed in a table of the following type:

Name	Communications & Actions	Key Interests & Issues	Current Status (advocate, supporter, neutral, critic, blocker)	Desired Support (high, medium, low)	Desired Project Role	Desired Actions
Stakeholder 1						
Stakeholder 2						
Stakeholder 3						
Stakeholder 4						

8. Project Management

Understanding how to plan a project makes the execution more effective, clear, and concise. In this section, we will discuss the project scope document from the British Museum in more depth and provide tips on how to manage projects.

8.1 Project Management in General

Before we delve into project management, we first need to define what a project is. According to the Project Management Institute, a project is a "temporary endeavor undertaken to create a unique product, service, or results." Basically, a project can be short-term and has defined goals. With that said, project management is important to achieve the defined goals. Project management helps to plan your project considering all aspects, including risk analysis and the underlying assumptions. This also allows you to be prepared for anything that might not go as expected and keep the project on a set timeline.

Project management is important for several reasons. Having a good understanding of the project can help you market it better to your superiors or potential funders. Project management helps to plan ahead for any issues that could be encountered. For example, having a plan to deal with a cut in funding. Besides, project management helps to determine the importance of a project, and whether it is a worthwhile investment. For example, if you decide to create a class at your institution and no one is interested in attending or participating, there is no purpose in pursuing this project. Another reason to perform project management, is early definition of project roles, which helps to avoid conflict during the project's course. If you know what you want to accomplish and who you need for the project, asking for help will be an easy way of determining who will have the time to devote to the project. A final reason is defining what success means for the project. Success means different things in different cases, (e.g. a successful invention project is the creation of a working invention) and knowing what your project needs to be successful allows you to plan accordingly. Further analysis into Project Management will be explored in this chapter.

8.2 Project Scope in-Depth

One the documents provided by the British Museum is the Project Scope document, which departments fill out when starting a project. It outlines what you plan on getting accomplished, how you will do it, how feasible the project is, and when/where will it be completed. The sections that are discussed in the document include an outline, goals, team structure and processes, resources, assumptions. timescale, risk assessment, measuring success, outputs and outcomes, and legacy and sustainability. Each Project Scope will be different, so don't feel as if your project needs to be one way only. In this section, we will discuss each section of the Project Scope Document further in depth.

8.2.1 Project Outline

The project outline is a summary of your project plans. This is completed to better understand and communicate the overall purpose of your project. Think of this section as a draft for an elevator pitch. You only have a couple of minutes to get across the plan and purpose of your project to someone else, who may not have any idea about your project or its progress. The question to consider for this part is how to best explain your project to someone else?

8.2.2 Goals

This section of the Project Scope document allows you to analyse what you want to accomplish and in what timeline. You need to understand where and when to be at each step of the project. One technique you could use to create your goals is S.M.A.R.T. This acronym stands for specific, measureable, attainable, relevant, and time-based. This states that your goals should be all of the letters in the acronym, in that they are not too broad, success is measurable, the goal is feasible, your goals match your purpose, and the goals can be completed in an attainable time frame. Taking all of these factors into consideration, the goals should be created and make fit the overall purpose.

8.2.3 Team Structure and Processes

In this section of the document, you need to figure who needs to be involved in the project. It may be fellow colleagues, bosses, the trustees funding your project, etc. Once you figure out who you need for the project, you will need to define the project roles. Questions to consider include who is in charge or who, how will they contribute to the project, and how significant is the role to completing the project? The defined roles will then need to be assigned to others. For example, a project manager is be needed to make sure everyone is completing assigned tasks, and should be given to an experienced person. Understanding the roles and their structure will help to determine the tasks for each individual and methods of communication.

8.2.4 Resources

What will you physically need to complete your project? Factors to consider include people, time, and money. Going back to team structure and processes, knowing who you need to complete your project is vital. Some people may not be available for the project's timeline, and you will need to find a replacement or work around their schedules. You will also need to determine the amount of time needed to complete the goals. Some goals will take longer than others and depend on other people (e.g. permission from the people in charge or your institution to complete the project). There should be preparation if some goals are not completed on time, which will be discussed further in the section on the timescale. To obtain the funds needed to run the project, developing a fundraising plan is a priority. When asking money from other people, be prepared to answer lots of questions about your project. This is why filling out the Project Scope document is very useful. Based on the resources needed, determine if this project is feasible. If you cannot get help from others, proper funding, or goals completed on time, reconsider the project. Understanding what resources you have and what you need aids in project planning.

8.2.5 Assumptions

This section allows you to explore what you need to happen in order for your project to be successful. While not all assumptions are true, understanding where you want the project to go will help to define goals, plan your timeline, and determine how to measure success. For example, the assumption that all funding for your project will be readily available allows you to plan as if you had the funding. This section is a good step to establish other parts of the Project Scope document. With all assumptions made, be sure to come back to these parts of the project and reassess if they end up being false.

8.2.6 Timescale

After figuring out how long each goal will take to complete, you should create a timeline for the entirety of the project. Start with the larger goals as milestones followed by the specific details. Some questions to consider are what are the milestones and when do you want the goals completed. Having a schedule not only allows you to to meet deadlines, but it allows the upper management in your project to keep others on schedule, too. Along with having a schedule, have alternatives in case goals aren't completed on time or someone suddenly become busy. Regardless of the project having a planned out timeline is helpful for accomplishing a lot of goals.

8.2.7 Risk Assessment

The risk assessment allows you to assess the potential risks you or others may face before, during, and after the creation of the project. Some questions to consider during the risk assessment are who this project affects, what are the specific challenges, and how can the risks be mitigated. This part is important because you need to have a plan if your project causes any risk. For example, if there is a project where the workload is preventing your mentee from focusing on the ITP, planning a way to mitigate the stress and workload would be beneficial not only to the group member, but the project overall. Types of risk will vary per project, but some examples include logistics, time, and money. It is suggested that you brainstorm some of the risks, add details, and then discuss mitigation. With this risk assessment, you should also classify the level of risk. There are three levels of risk: low, medium, and high. Low risk has minimal effects on others and while it should be addressed, it should not be considered as important. Medium risk has more importance and higher effect on others, but will not cause the failure of your project. High risk should be considered the most important and there should be many ideas on how to mitigate it since it affects many others. For example, a high risk for the mentor training programme is the mentors not being able to travel to London. This is high risk since one of the assumptions for the project to work is the mentors being able to go to the training and no mentors means no training. This risk can be mitigated by planning out travel months in advance of the training.

8.2.8 Measuring Success

Measuring the success of the project is vital to its legacy. Before you create an evaluation method for a project, you need to define what success is. For some, it may mean a large number of survey respondents, and others it may mean a positive evaluation at the end of a programme, a number of visitors reached at an exhibition, or an increase in performance for training attendees. With some brainstorming, you can define your project's success. Although with some projects success is easy to determine (for instance, the number of visitors), others require more sophisticated techniques, like surveys or interviews. Again, this depends on the details of your project, but with some brainstorming and online resources, measuring success should be feasible.

8.2.9 Outputs and Outcomes

Once you have completed the goals of your project, you need to analyse the outputs and outcomes you have achieved. The difference between output and outcome is that outputs are products, while outcomes are consequences of the project. Some questions to consider are what will the deliverables be and who/what will benefit from your project. For some projects, outputs can be physical, like worksheets, while others can be digital like survey responses. Outcomes are what you expect to happen because of the completion of your project. For example, the outcome of a presentation skills workshop is that the attendees will become more effective presenters. This section is basically what you expect to get by the end of the project. All of the outputs and outcomes depend on your project details.

8.2.10 Legacy and Sustainability

This section relates to the lasting effects of your project. For example, if it’s something that benefits the ITP and requires lots of evaluation and maintenance, sustainability is essential; if it’s a short-term exhibit, sustainability would minimal since it’s not being mantain each year. If you have a project that requires maintenance, you need to brainstorm who will keep up with it, if it’s not you. This also depends on how long the project takes to complete. There could also be a follow-up project, again depending on the details of your project. If there is a follow-up to your project, make some recommendations based on the progression of your project so that everything runs smoother the second or third time. Consider what kind of impact will your project make. Will it just benefit you, or will there be others who can gain knowledge from your project? This section needs to relate back to the purpose, taking into consideration if the goals have been met and the impact that was intended was made.

8.3 Your Mentee and Project Management

All of the information from this handbook and presentation can be used to give advice to your mentee, and for yourself, too. If they ask you specific questions about their own project management, use what you have learned and keep a couple things in mind. Do you understand the purpose of their presentation? Is there project feasible? What do they want out of the project? With that said, make sure they assess all aspects of their project and ask a lot of questions. It is important to have them thinking about potential challenges and risk so they can plan accordingly. Keep in mind that you should remain objective when discussing issues with project management, so they can improve their project with unbiased eyes. You can also apply this to the projects your mentee will complete at the ITP. While your mentee will have many projects, helping them with the ITP will especially be beneficial because of your experience. Overall, as long you allow them to practice project management and are there for advice and questions, your mentee should be able to learn project management.

8.4 Activities on the Project Scope Document

This is a list of some of the activities from the presentation. You can use these examples to practice your project management skills with the topics discussed in this chapter and can provide these are resources for your mentees.

Project Activity 1:
You are creating an exhibit working with a fellow ITP mentor from another country. You have to set up meeting times and need to figure out what you will need for the exhibit. There will be a ceremony and lecture before the opening of the exhibit. The exhibit will be displayed in a year from now and will be open to the public. Perform a timescale analysis for this project.

Project Activity 2:
You are setting up a training week at your museum as one of your duties as an ITP mentor. You will have a presentation, a handbook, activities, and special speakers in your field. The people attending will be from your country, but they will need to travel far to get your museum. This training programme will happen in a year from now. Perform a risk analysis on this project.

Project Activity 3:
You are applying for a grant in your field of study, and it requires a presentation of your intended project in front of a board of trustees on a very specific topic. While you are somewhat familiar with the topic, you still do not feel 100% prepared to give this presentation today. Luckily, you have 3 months before the presentation. Write out a legacy and sustainability analysis for this project.

9. Advocacy

One of the roles for the mentor is advocating for the ITP in your home country and potentially in countries nearby. In this chapter, we provide some general advice on advocacy and how you can apply it to the ITP.

9.1 Advocacy in General

Advocacy, as defined by the Cambridge English Dictionary, is the act of publicly "supporting or suggesting an idea, development, or a way of doing something." While advocacy is usually associated with humanitarian causes, it can be used to promote organisations, like the ITP. In the case of the ITP, advocacy is important for strengthening the alumni network and increasing the number of museum professionals attending the programme. Since the ITP doesn't have structured recruitment to find participants, hearing from the alumni will allow for more to not only hear about the programme, but also want to apply. Advocacy can occur in a number of ways, depending on the organisation or programme that is being promoted. For example, an event being run can be promoted on social media like Facebook by inviting people. Further advice on being an advocate will be explained in the next sections.

9.2 Tips on Advocacy

There are many factors and questions to consider when advocating for an organisation. The best way of convincing someone to participate is to communicate your points in a clear and concise way. The four ways of effectively advocating are having detailed and updated knowledge, planning out what you will say, effectively communicating, and building a network. Each of these will be outlined in the next sections.

9.2.1 Background Knowledge

In order to be able to advocate for an organisation, you need to have background knowledge on that organisation. Advocating for the ITP requires an active approach to acquiring background knowledge beyond your experience. You will have to read the newsletter, talk to other fellows about their past and current projects and communicate with the ITP team to be updated about the programme's structure, goals and expectations. For example, if you are advocating for the ITP and you don't know their overall purpose and goals, the people you are trying to convince to participate in the ITP won't know either. Do your research on the organisation before advocating for it.

9.2.2 Plan Out Conversations

In general, planning out what you want to get across to an audience is beneficial. Think of advocating as presenting your reasons for joining an organisation. You should plan out and practice what you want to say during a presentation. During presentations, you can tell when someone hasn't practiced or planned out what they what to say and it comes across as messy and unprepared. Planning ensures that you will get the main point across to whoever you are talking to. One way to plan out what you will say is by making an outline. Focus on the big ideas and then add in the details when you talk. Prepare as you would for any presentation, but have a back-and-forth conversation.

9.2.3 Effective Communication

You can have all of the knowledge about an organisation, but if you do not communicate that information effectively, your efforts to advocate will be lost. Some tips to effectively communicate include focusing on the main points, focus on the big picture then the details, answer questions to the best of you ability, direct further questions to the appropriate contacts, practice conversation, and make presentations. Making clear and concise points will allow your message to come across to the audience without confusing them. The main point is to make sure that you do not inundate people with too much information and that they come away from the conversation knowing why they should be a part of your organisation.

9.2.4 Build a Network

Developing and sustaining relationships may allow you to come into contact with more professionals in your field and advocate on a larger scale. Personal communication with professionals you know will make them feel closer to your cause and more likely to advocate for it, too. Remember to be friendly with anyone you talk to so that you can establish a relationship and make them feel welcome If someone were friendly when advocating for an organisation, would you be more likely to join?

9.2.5 Specific Ways to Advocate

Some ways to advocate include hosting events, online messaging, posting on social media, in-person conversations and telephone calls. For events, you could advocate at events that are already established or create events for your organisation. You need to take into consideration the size of the event. For larger events, you will be exposed to more people, and while the setting may not be intimate, you will be able to reach out to a larger number of people. For smaller events, you could have more in-depth conversations with people to advocate. Online messaging is helpful if you know the person. If there is a professional you know that could be interested; you could message them about your organisation. Make sure not to send them too many messages and allow the conversation to flow naturally. You don't want to scare the person off with too much information quickly.

Posting on social media is a great way to advocate for your organisation across a large group of people. There are a few things to keep in mind, however, when using social media. Avoid complaining about the organisation, posting too often about the organisation, and answering questions incorrectly. Instead, focus on the positive, make a post that is memorable, and allow an open forum for questions. If you don't have the correct answer for a question about your organisation, point the person to the correct contacts for the most accurate answers. There are a few tips to keep in mind; be focused on your objective, respect their time, introduce yourself, and listen to the other person. The purpose of advocating is to get your message across in a manner in which conversation doesn't feel forced.

9.3 Advocacy and the ITP

Following the sections on advocacy in general, what does it mean to be an advocate for the ITP? Being an advocate for the ITP means that you are using your own experience through the programme to help identify potential attendees. Some questions to keep in mind are how you found out about the ITP, how has the programme helped you, and why would you recommend it to someone else. Think about why you decided to go to the ITP and how that could be used to advocate for the ITP. Remember to keep the conversation very positive, especially if you benefitted from it professionally. Also, should you have any additional questions or they have questions you cannot answer, you can always contact Claire and the ITP alumni network. There are so many who have gone to the ITP that someone should be able to help you. In the end, the best way to advocate for the ITP is to practice. You can practice with someone else and try explaining the ITP and its benefits. If the person understands the ITP by the end of the practice conversation, they you have advocating.

10. Counseling

Counseling is an effective way of addressing a person's performance issues. It seeks to find the root of the problem in order to fix it. Performance issues can vary from disruptive behaviour to homesickness. It is very important for mentors to be aware of common counseling techniques in order to effectively handle situations where a mentee might be failing to maintain ITP expectations. Furthermore, counseling is a great way to strengthen the mentor and mentee relationship.

10.1 Basic steps for counseling

Florence Stone set up an outline on counseling in her book *Coaching, Counseling & Mentoring* :

1. <u>Separate the person from the group.</u> Separating the person from the rest of the group allows them to be more comfortable when discussing problems that affect their performance.
2. <u>Let the person explain his/her point of view.</u> Listening to what the person has to say about the problem will make the person feel comfortable. After listening to what he/she has to say, it is important to acknowledge what the person says.
3. <u>Determine what needs to change.</u> Describe the goals you wish to achieve to begin planning for improvement.
4. <u>Get the person to commit to an action plan.</u> It is important to create an action plan to address this issue and commit to its fulfillment.
5. <u>Give feedback and support.</u> Sharing personal experiences is a great way of giving advice, and it will encourage the person to commit to the action plan. Furthermore, have frequent discussions with the person to obtain updates and provide more support.

10.2 General counseling tips

Aside from the steps detailed in last section, there are other counseling techniques. Communicating clearly and effectively is important when counseling in order to avoid confusion and unnecessary conflict. Actively listening to the person will help you understand what the person is going through and will help to identify the underlying issue. You should always start the conversation with open ended questions to know the issue's background. Using previous experience as examples will help you support your argument when counseling. Things to avoid when counseling include ignoring the problem, hostility, dominating the discussion (not letting the other person talk at all), and dictating what the person should do given the situation.

10.3 Discussion Activity

Activity 1: Discuss common issues an ITP attendee has during the duration of the ITP. How would you help an ITP attendant solve each of these issues.

Discussion Activity: When Did You Fail?

Learning Outcomes:

The purpose of this exercise is:

- To critically assess a time in your life that you experienced failure. This will help you address failure better with your mentee.
- To gain confidence in yourself to be able to share personal experiences. This will bring you closer to your colleagues and fellow mentors and allow you to open up to your mentee when appropriate.
- To bolster your presentation skills. The more practice you have presenting, even informally, the better you will become!

Goal:

Failure is a natural part of anyone's life. There will be times when your newest project doesn't work out the way you hoped or you don't get accepted to your dream job. It happens to everyone.

The good thing about failure is that you can learn from it. Being able to critically think about why you were not successful is important to avoid failure in the future.

For this activity, you will be discussing a point in your life where you experienced failure. Some questions that may help guide you include:

- What was your goal?
- Why do you think you were unsuccessful?
- What issues were important to your success and why were they not addressed?
- How could you have potentially avoided this failure?
- What lessons did you learn from this experience that you will use in the future?

This experience should also be interactive for the audience. Be able to share your thoughts with the person on their story.

While you can't change history, you can offer ideas for why you think the failure occurred. State how you might have handled the situation differently. Of course, you can't directly blame the person for their failure. Be constructive in your thoughts and do not point out flaws in the person's story or situation.

Confidentiality Agreement

Name of Mentee and Organization:	Name of Mentor:
Mentee Address:	Mentor Address:
Mentee Phone Number:	Mentor Phone Number:
Mentee Email Address:	Mentor Email Address
Other Mentee Contact Info:	Other Mentor Contact Info:

1. **How often will you meet and when will the meetings take place?**

2. **How will you conduct your meetings? (in-person, Skype, phone, etc.)**

3. **What are your preferred means of communication (phone, email, Skype)?**

4. **What are your expectations for this mentor/mentee relationship?**

5. **What do you NOT want to be part of this relationship? What will be the boundaries to your relationship?**

By signing this document, I agree to perform my role to the best of my ability and try to fulfill the expectations set forth for this relationship.
Mentee Signature:

____ Date: ________________

Mentor Signature:

____ Date: ________________

Recommended Sources

Here is a list of books in case you want to research outside of this handbook based on the topics we discuss.

Presentation Skills

Chivers, B. & Shoolbred, M. (2007). *A Student's Guide to Presentations: Making your Presentation Count*. SAGE Publications

Siddons, S. (2008) *The Complete Presentation Skills Handbook: How to Understand and Reach your Audience for Maximum Impact and Success*. Kogan

DK (2015) *Essential Managers: Presenting*. DK

Mentoring Skills

Wilson, C. (2014) *Performance Coaching: a Complete Guide to Best Practice Approaches*. Kogan

Pask, R. & Joy, B. (2007) *Mentoring-Coaching: A Guide for Education Professionals.* McGraw Hill

Stone, F. (1999) *Coaching, Counseling & Mentoring: How to Choose & Use the Right Technique to Boost Employee Performance.* AMACOM

Potts, C. (2013) *Assertiveness: How to be Yourself in Every Situation*. Capstone.

Holland, S. & Ward, C. (1997) *Assertiveness: A Practical Approach*. Routledge.

Team Building and Management

Dyer, W., Dyer, F. (2013) *Team Building: Proven Strategies for Improving Team Performance.* Wiley

Parker, G. (2010) *Successful Team Building: 20 Tips, Tools, and Exercises*. HRD Press

Stakeholder Management

Thompson, R. *Stakeholder Management.* Retrieved from https://www.mindtools.com/pages/article/newPPM_08.htm

Cascading Training

Silberman, M (2015) *Active Training: A Handbook of Techniques, Designs, Case Examples, and Tips.* Wiley

Time/Workload Management

Hoover, John. (2007) *Best Practices: Time Management.* Collins.

Hindle, Tim. (1999) *DK Essential Managers: Manage Your Time.* DK.

Stone, F.. (1999). *Coaching, Counseling & Mentoring.* American Management Association .

Project Management

Project Management Institute. (2017) What is a Project? Retrieved from https://www.pmi.org/about/learn-about-pmi/what-is-project-management

Advocacy

Cambridge University Press. (2017). Advocate. Retrieved from http://dictionary.cambridge.org/dictionary/english/advocate

Nixon, A. (2008). Advocating to the Stakeholders. *Tate Papers. (10)* Retrieved from http://www.tate.org.uk/research/publications/tate-papers/10/advocating-to-stakeholders