

The many “Firsts” we pioneered enabled us to become **Experts in Developing Formalized Mentoring Programs** for different Career Stages.

From early mistakes at the **lower Levels** below, we learned how to “get it right.” We became **Experts** at preventing “fix-ups” that saved money for our Clients.



Mentoring Expertise provided by Mentoring Solutions

Dr. William A. Gray and Marilynne Miles Gray, MA, MEd co-founded *Mentoring Solutions* to pioneer, research and develop appropriate *Formalized Mentoring Programs* (200+ thus far). We've trained more than 25,000 **Mentoring Partners** because this produces better outcomes than training ONLY mentors or proteges (mentees). Since 1978.

How we became Experts in providing *Different Mentoring Solutions* over 45+ Years

5 Stages/ Levels	Stuart and Hubert Dreyfus studied how Experts develop in different fields of endeavor. Their meta-analysis of many studies revealed five Stages/Levels for becoming an Expert in a dedicated field of practice. <small>Reference: Stuart E. Dreyfus (2004). The five-stage model of adult skill learning, <i>Bulletin of Science, Technology & Society</i>, No. 24, pp. 177-181</small>
Highest Level: Mentoring Expert	Has 10 dedicated years developing <u>many different types</u> of <i>Formalized Mentoring Programs</i> . Knows how to facilitate a Collaborative Program Planning Process with Key Stakeholders. Knows how to include <i>Skill Coaching</i> to develop needed Competencies. Knows how to satisfy the Business Case for starting the Program AND produce ROI to offset Program costs. Discovers the <i>Guiding Principles</i> that others employ.
Proficient Level	Can plan and implement several <u>different types</u> of <i>Formalized Mentoring Programs</i> (for New Hires, Career Development, Leader Development). Cannot plan and implement <u>atypical</u> Programs that have multiple Goals.
Competent Level	Has repeated experience developing <u>one type</u> of <i>Formalized Mentoring Program</i> . Cannot develop variations.
Advanced Beginner	Knows how to launch a partially-planned <i>Mentoring Initiative</i> that works slightly better than <i>Announcements</i> . Often requires costly “fix-ups.”
Novice [lowest]	Little or no direct experience. Likely to make <i>Announcements</i> that encourage <u>informal</u> mentoring to “do-your-own-thing” – which doesn't work AND requires costly “fix-ups.”

1971-75

- Obtained funding (\$74,000) to create the first program anywhere – 18 units of coursework complemented by extended in-school practicum – to **prepare team teachers for Open Area/Open Space/Open Plan Schools**. (Called the Open Area Teacher Preparation Program or OATPP.)
- Developed an assessment for identifying the most suitable preservice teachers to participate in this innovative type of program. (This assessment predicted with 98% accuracy who would be successful on an Open Area teaching team; used to enroll the most suitable candidates in OATPP.)

- Developed and copyrighted Gray’s Teacher-Student Relationship Model (T—Ts—TS—tS—S) for using appropriate instructional methods, discipline, communication and grouping of students in Open Areas.
- Wrote unpublished *Manual on Implementing Open Area Education* (with Ann Lukasevich).

1978

- Created the **first Formalized Mentoring Program**. Mentors were preservice teachers at the University of British Columbia, who carried out structured Mentor-Assisted Enrichment Projects with Gifted/Talented proteges in grades 4-7, mostly focusing on STEM topics (Science, Technology, Engineering, Mathematics). Later included other kinds of proteges in grades 4-12. Mentors earned course credit for doing this.
- Began 8 years of R&D on Mentor-Assisted Enrichment Projects (MAEPs) to discover appropriate training, incentives, and structure needed for mentoring different kinds of young proteges (eventually included Gifted/Talented, English-Second-Language, At-risk, Native and Other youth in grades 4-12).
- Began research on **Concerns of Preservice Teachers** (based on Francies Fuller’s findings) that led to this first-ever discovery: carrying out a MAEP with a small group of protege enables preservice teachers to skip Stage 1 Concern for “Self” and begin with Stage 2 Concern for “Them” (the small group) – and reach Stage 3 Concern for “Individuals” by the third meeting. Fuller and others had found that no preservice teachers reach Stage 3 where they identify and respond appropriately to individual learners and become effective teachers.
- First used **Group Mentoring** (one mentor provides mentoring for several proteges with a common goal).
- Created first **Mentoring Action Plan** so all participants would be prepared for meetings, complete MAEPs on schedule, and present what was done and learned to others so they also could benefit.
- First **trained Mentor-Protege Partners** – to start relationships (mentoring occurs during Partner Training).
- Began research that led to discovery of 4 Mentoring Styles (ultimately named: Informative, Guiding, Collaborative, Confirming) so mentors could provide assistance that proteges would accept and utilize.

1979

- Created first version of the *Mentoring Style Indicator (MSI for Mentoring Youth)* for identifying the style of mentoring a mentor likes to provide and a protege likes to receive. (This was the first time that the 4 Mentoring Styles were depicted in Gray’s Mentor-Protege Relationship Model: M—Mp—MP—mP—P)
- Began teaching how to use 4 Mentoring Styles in a flexible manner so mentors could provide assistance that proteges would accept and utilize: 2 Mentoring Styles (M=Informational, Mp=Guiding) **equip** proteges with what mentors know and 2 Mentoring Styles (MP=Collaborative, mP=Confirming) **empower** what proteges want to do and become. (Found via research that “Mentoring Style Flexibility” enhances mentoring relationships, and makes them more productive; “Getting Stuck” on a preferred style eventually causes relationships to end.)
- Developed Mentor Training that enabled mentors to **connect “knowing about” STEM topics with “knowing how” they are used/applied** in the real world while carrying out Mentor-Assisted Enrichment Projects. (Increases young protege’s competence and motivation to pursue STEM courses and careers.)

1980

- Began research on essential components of Formalized Mentoring Programs that must be appropriately defined, designed, aligned, and delivered to produce intended outcomes. (True “Programs” work better to produce better outcomes than simple “Announcements” to “do your own thing” or partially planned “Mentoring Initiatives” that lack essential components.)
- Defined 10 distinguishing characteristics of Formalized Mentoring Programs and Informal Mentoring that “just happens” to clarify confusion. (Nearly 100% of everything written about mentoring described Informal Mentoring – until my wife and I began to describe Formalized Mentoring Programs.)

1981

- Began providing Mentor-Assisted Enrichment Projects for English-Second-Language students – with emphasis on developing their oral and written language capability.

- Began providing Mentor-Assisted Enrichment Projects for At-risk students – with emphasis on motivating them to stay in school.
- Began providing Mentor-Assisted Enrichment Projects for Native students – with emphasis on understanding and appreciating their culture.
- Further R&D on the Mentoring Action Plan led to inclusion of a Brainstorming step to ensure that proteges have input into the Plan – which further increased success. (29 of 31 grade 5/6 proteges reported that carrying out and completing an agreed-upon Mentoring Action Plan made the MAEP they did worthwhile; this is a highly significant finding: $p < .0000$; published in 1982 in *Educational Leadership*)

1982

- Because of prior research findings on the Concerns of Preservice Teachers who carry out Mentor-Assisted Enrichment Projects with small groups of student-proteges, MAEPs replaced teaching entire classes on the Initial Practicum for Future High School Teachers when the dropout rate reached 40%.
- Began replicating prior “Concerns” research and discovered the same results: beginning student teachers (as mentors) reached Stage 3 Concern for Individuals by the third meeting with small groups of proteges.
- Began doing research on these same student teachers when they subsequently taught entire classes – and found that 60-80% (depending on the semester researched) were able to identify and respond appropriately to individual students. No researchers had obtained this finding (Concern for Individuals).
- Created a training videotape – *Mentor-Assisted Enrichment Projects* – that showed how two mentors and their proteges carried out all structured phases of a MAEP.

1983

- Wrote the first Phi Delta Kappa publication on mentoring: *PDK Fastback #189* entitled “Challenging the Gifted and Talented through Mentor-Assisted Enrichment Projects.”
- Began to help 20 Phi Delta Kappa chapters across North America implement Mentor-Assisted Enrichment Projects for different kinds of proteges in grades 4-12.
- First **trained parents to mentor their own children**, by teaching them the difference between Parenting Styles (depicted in Gray’s Parent-Child Relationship Model: P—Pc—PC—pC—C) and 4 Mentoring Styles that equip and empower proteges (depicted in Grays’ Mentor-Protege Relationship Model: M—Mp—MP—mP—P). Emphasized that Parenting Styles (e.g., Authoritarian, Democratic, Laissez-faire) are often unchanging, whereas Mentoring Styles must be used flexibly for different situations.

1984

- Developed and used **Co-Mentoring** (two mentors provide mentoring for proteges with a common goal).
- Introduced **Rotational Mentoring** (rotating proteges through mentors to gain different perspectives and learn different competencies).
- Published and copyrighted the *Mentoring Style Indicator for Business & Government* that enables mentor-protege partners to work together better and more productively. (Eventually became the *MSI for Career Development*.)
- Developed & copyrighted *Coaching Improved Person-Job Fit* (one-day course utilizing Gray’s Systematic 5-Step Coaching Model: C—>Cl—>CL—>cL—>L).

1985

- Co-authored (with Marilynne Gray) the first article on “Synthesis of Research on Mentoring Beginning Teachers” (*Educational Leadership*).
- Prepared to leave academia to develop Formalized Mentoring Programs as a full-time business.

1986

- First to plan, implement and evaluate a Formalized Mentoring Program to help new hires develop technical competencies (having knowledge, attitude and skill elements) by using a 4-D Process (Describe/Demonstrate competency, Do activity, Debrief) in a corporation (Pathfinder software, now called StarGarden).

- Sponsored & organized the **First International Conference on Mentoring** – hundreds of attendees come from Canada, USA, UK, Europe, Australia and Asia.
- Edited & published the first Conference Proceedings on Mentoring (Vol. 1 *Mentoring: Aid to Excellence in Education, the Family and the Community*; Vol. 2 *Mentoring: Aid to Excellence in Career Development, Business and the Professions*).
- Wrote & published the first annotated bibliography on mentoring (*Mentoring: A Comprehensive Annotated Bibliography of Important References*).
- Began publishing the first newsletter on mentoring (continued for over 20 years): *MentorInk Newsletter*.

1987

- Began publishing the first peer-reviewed journal on mentoring: *International Journal of Mentoring* (later renamed *Mentoring International* in 1989).
- Began developing & using a Collaborative Program Planning Process (involves stakeholders, nay-sayers and focus group for collaboratively planning best-fit Formalized Mentoring Programs).
- First to plan and implement **Knowledge Exchange** to overcome intergenerational conflicts (veterans imparted “tricks of the trade” while recent hires imparted the latest technology tools at Varian Associates).
- Developed Training course and materials for California State University System’s “Peer Mentoring Program” and “Faculty Mentoring Program” for Freshmen Retention: *Mentoring Style Indicator for College Students*; *Protege Needs Inventory for College Students*; *Developing Mentoring Relationships* (workbook for training mentor-protege partners).
- Created the first **Job Training Program** that utilized Trait-Intervention-Results Model and formalized mentoring to attach chronically unemployed to the workforce: wrote proposal and obtained funding (\$900,000 from BC & Canadian governments) for Project Job-Keep; main roles were Trainer and R&D Manager (developed a paper-based assessment that predicts with 98% accuracy who will keep a job after completing Job Training).
- Developed & copyrighted the *Mentoring Style Indicator – Generic Version*.
- Developed & copyrighted the *Mentoring Style Indicator for New Hires*.
- Developed & copyrighted the *Mentoring Style Indicator for Educational Administrators*.
- Developed & copyrighted the *Mentoring Style Indicator for Mentoring New Teachers*.
- Developed & copyrighted the *Mentoring Style Indicator for Career Development*.

1988

- **10th Anniversary**: first to celebrate 10 years Developing Formalized Mentoring Programs.
- Identified & published: *Essential Components of Successful Mentoring Programs* (distinguished essential components of true “Programs” from simplistic “Announcements” and partially-planned “Initiatives”).
- First to plan and use **Rotational Mentoring** to develop future leaders in a diversified workforce – every 6 months for 3 years these proteges rotated through C-Level Officers to gain new perspectives and competencies (at Winthrop Pharmaceuticals).
- Planned and implemented first Formalized Mentoring Program to assist **Disabled Workers** (for Employment Networks Project).
- Created the first of many *Protege Needs Inventory* (called *Inventory of College Student Needs*, with Dr. Marcia Canton)
- Organized First Invitational Symposium on Mentoring. (Philadelphia, PA).
- Developed & copyrighted the *Mentoring Style Indicator for Entrepreneurs*.

- Created *Mentoring Style Indicator for College Students*.

1989

- First to plan, implement and evaluate Formalized Mentoring Programs to **support EEO** (Equal Employment Opportunity), **Affirmative Action** and **Diversity Initiatives** for underrepresented groups in corporations (at Exxon and Pac Bell – now Pacific Telysis). (Thereafter, these became prime drivers for over 90 % of all Formalized Mentoring Programs I developed – for corporations and government groups.)
- First to identify and use researched-based **Needs of New Teachers** for training mentor-protégé partners to address these needs, and evaluate how well this was done for individuals and the group of new teachers (Langley School District, BC).
- First to use multiple focus groups to evaluate a one-size-fits-all “Mentoring Initiative” that was not working as expected; used this feedback to create **3 distinctive Formalized Mentoring Programs** (for New Hires; Consultants; Professional Development) at AT&T Consumer Products Labs.
- First to plan and implement **Group Mentoring** and **Mentor-Assisted Projects** in corporations (to retain High Potentials and get innovative products to market faster than competitors – at AT&T Consumer Products Labs).
- First used **Gray’s Training & Development Model** (T→Td→TD→tD→D) to train internal consultants (in Eastman Kodak’s Management Services division) to provide training needed by Kodak’s 30,000 professionals so they would develop and use needed competencies.
- Identified & published: *Basic Questions for Starting and Implementing a Pilot Mentoring Program*.

1990

- First to plan and implement formalized mentoring with an **Internship Program** to increase the number of new hires from this group (at Brooklyn Union Gas).
- First to plan and implement **2-Phase Mentoring** in a Management Training Program: peer mentors oriented new managers to the re-organized company; they then received mentoring from veterans to help them succeed in their new positions (at Brooklyn Union Gas).
- First to plan and implement **Co-Mentoring** in corporations (at Occidental Chemical, Year 2-3 employees served as primary mentors for new hires, and both groups received mentoring from supervisors when primary mentors had knowledge gaps because they had received no mentoring).
- First to plan and implement **Knowledge Exchange** in a corporation (occurred between PhD researchers with chemical and electronics backgrounds) to develop better working relationships so they could get new products to market faster at Eastman Kodak.
- Created and copyrighted *Mentoring Style Appropriateness Scale*.
- Developed program & materials for: *Mentor Training Booklet for Entrepreneurs*.
- Created and copyrighted *Protégé Needs Inventory for New Hires*.
- Created and copyrighted *Protégé Needs Inventory for Career Development*.
- Developed and copyrighted *Inventory of New Faculty Needs* (with Dr. Marcia Canton).
- *Mentoring Style Indicator*® became the first mentoring-specific assessment to be published in O.K. Buros’ *Mental Measurements Yearbook*.

1991

- Identified characteristics of different Formalized Mentoring Programs that are needed for different stages of career development (from new hires to executive level).
- First to plan and implement a Trait-Intervention-Results Model plus formalized mentoring to keep at-risk youth in school (New Westminster Stay-in-School Program).

- Planned and implemented the first Formalized Mentoring Program for supporting “Valuing Diversity” training videos (at Dow Chemical).
- Created and copyrighted *Developing Mentor-Protege Relationships* (workbook for training partners in corporate settings).
- Created and copyrighted mentoring *Action Planning Guide*.
- Created and copyrighted *Guide for Agreeing on Expectations, Concerns and Desired Benefits*.

1992

- First to plan and implement a **Partner Matching+Training process** to match mentor-protege partners (30-120 minutes to do matching after a half-day workshop) and then train partners the next day (at Kaiser Permanente).
- Created and copyrighted Train-the-Trainer course for training mentor-protege partners.
- Created and copyrighted *Mentoring Style Indicator – Leader’s Guide*.

1993

- Identified 9-Step Mentoring Process for handling especially difficult protege challenges.
- Created and copyrighted *Mentoring Style Indicator for Sales Training & Development*.

1994

- Created and implemented an innovative Sales Training course in which I could not teach sales competencies – two highly rated Sales Training Courses had not worked previously, when staff became resistant to becoming true sales persons. So, I had trainees identify their “Buying Styles” and then teach what constitutes Good and Bad Sales Practices; utilized my 6-Step Mentoring Process to overcome resistance to becoming a sales person and my 5-Step Systematic Coaching Model to learn new skills. (Increased sales by 5% at Purdy’s Chocolates.)
- First to plan and use **Reverse Mentoring** to enhance a Diversity Initiative (subordinates mentored C-Level Officers on diversity at AT&T Global Business Communication Systems).
- Created and copyrighted *Build Better Teams by Understanding Personal Style and Learning to Style-shift*.
- Created and copyrighted *Mentoring Action Guide* Workbook.

1995

- Planned and implemented first **Global Mentoring Program** for Developing Leaders in a corporation (SNC•Lavalin).
- Created and copyrighted *Mentoring for Results* videotape & workbook for training mentor-protege partners.
- Created and copyrighted *Mentoring Solutions* videotape and Guide for developing successful Formalized Mentoring Programs.
- Created and copyrighted *Mentoring Compatibility Indicator* for matching mentor-protege partners.
- Created and copyrighted *Mentoring Style Indicator for Health Care Professionals*.

1996

- Planned and implemented the first **Multi-tiered Mentoring Program** in a corporation, where senior vice-presidents mentored subordinates, who mentored subordinates (at First National Bank of Omaha).
- Planned and implemented the first Mentoring Program for a corporate employee network group (Women’s Information Network at Sara Lee Hosiery).
- Organized and facilitated first Mentoring Network for Coordinators of Formalized Mentoring Programs – sponsored by CSX Transportation (Amelia Island, FL).

- Created and copyrighted *Mentoring Perception-Check Guide* (mid-point activities to enhance mentoring); used this to enhance mentoring relationships at Phillips Petroleum.

1997

- Began developing **first web-based Mentoring Management System®** – by converting proven paper products into Online Tools with added functionality (e.g., *Protege Needs Inventory* became Needs/Expertise Inventory; *Mentoring Style Indicator* scores were instantly tabulated and interpreted) -.
- Organized and facilitated Mentoring Network #2 for Coordinators of Formalized Mentoring Programs – sponsored by NCR (Dayton, OH).
- Created **6-Step Mentoring Process** for handling especially difficult protege challenges.
- Created and copyrighted *Mentoring Style Indicator for Developing Leaders*.
- Created and copyrighted *Mentoring Style Indicator for College & University Faculty*.

1998

- **20th Anniversary**: first to celebrate 20 years Developing Formalized Mentoring Programs.
- Released first multi-functional, web-based Mentoring Management System® (originally called **Online Mentoring System** or OMS).
- Organized and facilitated Mentoring Network #3 for Coordinators of Formalized Mentoring Programs – sponsored by NCR (Dayton, OH).
- Created and copyrighted *Protege Needs Inventory for Leaders*.

1999

- Released and copyrighted version 2 of Online Mentoring System (OMS) and the *OMS Coordinator's Guide*.
- Began development of newly designed Mentoring Management System (to be called Colaboro®).

2000 - Present

- Licensed the use of Colaboro® Mentoring Management System® version 1 for Formalized Mentoring Programs (Coordinator matches mentoring partners).
- Continued to add new online Tools with additional functionality in Colaboro® versions 2, 3, 4 to make each version even more User friendly:
 - converted paper-based *Mentoring Compatibility Indicator* into an Online Tool that instantly matches most compatible mentoring partners on Learning Style, Working Style and General Style of Functioning
 - converted paper-based *Mentoring Action Plan* into an Online Action Plan that can be used for mentoring and for different kinds of Knowledge Solutions, such as Knowledge Sharing anytime or systematic Knowledge Transfer; can be easily modified by Users and monitored by Coordinators
 - converted Gray's Systematic 5-Step Coaching Model into an online *Coaching Plan* that ensures skill mastery, and can be easily modified by Users and monitored by Coordinators
 - converted paper-based *Guide for Agreeing on Expectations, Concerns and Desired Benefits* into online Partner Agreement that can be modified by Users and monitored by Coordinators
 - created AutoMatch to enable Coordinator to electronically match an entire group in minutes (100 pairs in less than 1 minute; 200 in less than 2 minutes; etc.)
 - created an Online Survey with Templates that Coordinators can quickly modify to create surveys and send them to targeted groups (only mentors, only proteges, both groups, Coordinators, etc.)

- created Virtual Library that contains two training videos (*Mentoring for Results* video & me training mentor-protégé partners) plus PDFs that provide more information on Online Tools
- created FAQs and Answers plus PDF Guides for Online Tools so Users and Coordinators can get immediate assistance to reduce the cost of Technical Support
- Prepared and copyrighted *Coordinator Manuals* for each version of Colaboro®.
- Developed Colaboro® to facilitate **Self-Directed Mentoring Initiatives®** where Users can quickly and precisely find their own mentoring partners using the Needs/Expertise Inventory and Demographic Profile.
- Prepared Mentoring ScoreCard Survey – released to Mentoring Program Coordinators around the globe; results published in *MentorInk Newsletter*.
- Developed and copyrighted the **Mentoring Interest Profiler** (identifies who is interested in what kind of mentoring) to guide the development of Formalized Mentoring Programs.
- Trained and supported over 40 Coordinators to oversee the use of Colaboro®.
- **30th Anniversary in 2008**: first to celebrate 30 years Developing Formalized Mentoring Programs.