

MENTORSHIP TOOLKIT



INTRODUCTION

What Can Mentorship Do for You?

Implementing a formal mentoring program has numerous benefits not only for your employees, but for the entire organization. Mentorship can help integrate new employees into the office culture and has been known to increase employee effectiveness and job satisfaction.

Talent management strategies and increasing employee retention in state public procurement offices have been among NASPO's Top 10 priorities for the past five years. Mentorship programs can be a relatively low-cost tool you can use to attract new employees. Formal mentorship programs provide your employees with continuing educational opportunities and are widely known to contribute to career success. Indeed, having a formal mentorship program is one of the criteria *Fortune* uses when creating their list of "Best Companies to Work For!"¹

A mentorship program can attract employees and increase retention but can also be a useful succession planning tool. Pairing mentees with more experienced mentors can allow for cross-training and the transfer of necessary skills in an organization. This is particularly important when you are preparing for the retirement of more experienced employees. A robust mentorship program can improve the work environment. It helps employees acquire leadership skills and new competencies thus providing a more competent workforce for the future.

With all of these benefits in mind, this toolkit is designed to help you design a formal mentorship program.

How to Use this Toolkit

This mentorship toolkit is broken down into three sections. Section I and Section III are designed for the program leader while Section II is designed to assist the mentor/mentee in the development of their relationship. However, the program leader would need to review all three sections of the toolkit before initiating the program to gain an in-depth understanding of the entire process needed to set up a formal mentorship program. From beginning the program to understanding the mentoring relationship and learning how to monitor progress, it is important to understand the full picture.

This toolkit provides templates and additional resources to assist you in your journey. These templates, questionnaires, and sample agendas are all located in the appendices at the end of each section. You do not have to utilize all these tools to continue on in the process; however, they may be useful to review. Each section of the toolkit provides relevant content about the realities of designing, implementing, and maintaining a formal mentorship program in an organization and is designed to support all key players in a mentorship program.

MENTORSHIP TOOLKIT

Section I: Design Your Program

SECTION I: DESIGN YOUR PROGRAM

A successful formal mentorship program is attainable at any organization. The first step is to make sure your mentorship program goals and objectives are aligned with the organizational goals and culture.

In this section we provide guidance on how to assess the workplace culture, how to create policies and procedures, and how to build institutional support for a mentorship program.

The templates provided at the end of this section can serve as tools to help you design your program. They include:

- A sample meeting agenda;
- A template letter to request support from the leadership;
- A mentorship program outline, and
- A checklist and worksheet to aid the program-leader in the planning stage.

NORTH CAROLINA CASE STUDY

It has been the policy of the State of North Carolina to provide mentorship programs to state employees since 2005.

Per Administrative Rule 25 NCAC 01K .0801-.0805, agencies may set up a formal mentoring program based on available funds.

The Office of State Human Resources (OSHR) is responsible for the administration of the statewide program. The agency is responsible for developing a mentoring program tailored to their own needs, including the curriculum, selecting participants and funding the program.

The OSHR Manual includes guidelines for creating a formal agency mentorship program.

Assessing Your Organization's Culture

Mentoring requires a culture that supports learning and relationship building. Designing a formal mentorship program enhances the culture and buy-in of internal stakeholders. Alignment between mentoring goals and organizational goals builds the foundation for implementing a successful program. It is worth taking the time to understand your workplace culture to ensure you implement the type of mentorship program your organization needs.

Your organization has entity-specific habits, which are communicated amongst all employees. The culture of your organization is akin to viewing a painting. The overarching view of the artwork represents your organization's culture. The up-close individual brushstrokes are the different pillars supporting that culture. To dive deeper into your own culture, think about what attributes your organization values.

- Is there an “unofficial” philosophy in your organization?
- How does this affect daily processes?
- What assumptions can you reasonably make about how employees will respond to a mentorship program?
- What beliefs do they hold that would inform their response?

Answering these questions are part of assessing your organization's culture and will help you design your program in an effective way.

Building Your Program

Review each section below for a few necessary actions to consider in the early stages of designing your mentorship program.

Establishing Your Work Group

Building your mentorship program involves careful preparation. Whether it be a task force, work group, committee, etc., they will gather feedback from all stakeholders expected to participate in the program. This select group will identify the cultural aspects of the organization, construct a shared vision, create a mentorship policy and lead the development of all program components.

Consider hosting a meeting with individuals from your office to kick off your mentorship initiative. Make sure to include people who:

- Have diverse perspectives reflective of your office's culture
- Are able to commit time to your mentoring program rollout
- Have different roles in the office, i.e., new hire, experienced employee, office leadership position, etc.

We have created a template agenda for your initial meeting to help guide discussion about your new mentorship program.

Developing Program Goals and Objectives

Having clearly defined goals for your program is important. What would you like to accomplish with this program? Cross-training, onboarding and increasing retention are possible goals for your mentorship program.

Discuss your overarching goal in your work group and create a clearly defined document that outlines the mission statement for the program. Best practices suggest this statement should align with your agency's mission statement.

Requesting Leadership Support

To create a successful and sustainable mentorship program in your organization you must have the support of leadership and appropriate funding. In a public procurement office, this can solidify the alignment with the enterprise goals for employee training and ensure buy-in from employees who will be more likely to engage in the program.

Provided in this toolkit is a customizable template letter to an office leader requesting support for setting up a mentoring program in your office. Consider enclosing a draft of your proposed program policy and/or providing details on the program and expected outcomes. We have included a Program Outline template and North Carolina's OSHR Mentoring Program to assist you in creating this proposed program policy.

Defining a Review and Continuous Improvement Process

A successful mentorship program will include a continuous improvement approach. Continuous improvement involves frequently checking in on mentoring relationships and refining program goals and objectives. Reviewing the progress of mentoring pairs can help you address any potential challenges before they turn into obstacles. Both mentor and mentee feedback should be welcomed to ensure improvement opportunities are identified along the way. From the feedback provided by your mentor and mentee, you can re-evaluate program goals and processes in an informed and productive way.

A Continuous Improvement Template is provided at the end of Section II for the mentors/mentees to fill out, which can be periodically reviewed to collect feedback, identify gaps and gather improvement ideas. The program leader should use this feedback to make any needed adjustments to maximize program efficiency.

Consider developing a protocol for addressing problems that may arise during the mentorship process. While most issues are merely stumbling blocks to overcome, there should be a process in place to address any grievances or issues that need immediate attention.

Defining the Duration of Your Mentorship Cycle

The work group should establish a suggested duration of the formal mentorship relationship and meeting frequency. This duration may vary based on the goals you have for the specific mentorship relationship, but best practice suggests a range from six months up to one year.

Defining Participation and Incentives

Establishing the Enrollment Process

Your work group should establish a process for enrollment. Will you approach potential mentors/mentees and suggest participation in the program, or will you make it a volunteer program that requires an expression of interest or formal application?

Section II provides a set of two questionnaires for both the mentor and mentee that can also be used for this step, as a part of the enrollment/application process.

Developing a Reward System for Participants

The mentorship team should work with leadership to identify feasible ways to reinforce positive incentives to encourage participation in the mentorship program. Consider utilizing formal recognition and other simple reward strategies (i.e. certification, skillset, change in job title) to successfully reward participation in the program. Formal recognition and incentives help increase the program visibility. Additionally, it will help keep your office staff motivated and interested in participating. The celebration step should be included in your program cycle. When creating this phase, you should consider who you will be recognizing, how you will gauge participants' progress and the timing of the recognition in relation to the entire mentorship program.

Best practice suggests designing a successful mentorship program begins with aligning program goals with organization goals and engaging support from multiple levels of management. Assess your organizational culture to identify early on any potential hurdles and plan for a way to navigate them efficiently. Next, build your work group by choosing participants from diverse backgrounds with different roles and levels of authority from your agency. Work together to clearly outline the program goals and relate them to organizational goals and policies. Mentorship programs encourage growth and reflection and the program itself is no exception. In your work group, make sure to identify a continuous improvement process. This toolkit provides a Continuous Improvement Template for use in Section II. The work group should also define the length of the program, application process that best fits organizational needs and identify what way the program will celebrate or reward the participants. Creating a formal mentorship program in your organization is an attainable goal. The remaining two sections of this toolkit focus on the building of the mentor/mentee relationship in partnership with the program leader.

DESIGN YOUR PROGRAM TO FIT YOUR GOALS!

It is important to design your program to fit the needs of your agency! Below are two examples from states that implemented different types of programs based on their agencies' needs.

Georgia: Georgia's State Purchasing Division needed to create a program to support employees who wanted to advance their careers. The program helped them continue to grow their skillsets while building a succession plan that would benefit the office. To accomplish this, the state of Georgia launched the Leadership Academy. Participants meet once every four to six weeks for an all-day class where subject matter experts discuss different issues facing the central procurement office. It was important to get executive leadership support for the Leadership Academy because throughout the program, mentees interact closely with leadership and learn more about their roles.

Illinois: Illinois designed its mentorship program to foster learning opportunities and help newer employees become CPPB or CPPO certified—a mandated qualification by the state. Senior State Purchasing Officers act as mentors to Procurement Specialists while they are training for their exam. Illinois created a formal training checklist for the program to ensure there were no gaps in the mentee's understanding of the procurement process and code. The overall goal of the program is to make sure the mentees are able to perform their functions as State Purchasing Officers at the conclusion of the program.

MENTORSHIP TOOLKIT

Section I: Proposed Templates

PROGRAM CHECKLIST

Here are some recommended steps for your planning stage:

DEVELOP BUSINESS CASE AND JUSTIFICATION

- Strategic program alignment with organizational goals
- Communicate benefits and get buy-in from leadership
- Secure continual support from leaders and stakeholders
- Establish reward system for participants

BUILD YOUR PROGRAM

- Establish funds for the program; account for all time and financial commitments
- Establish clear and concise program goals and objectives
- Establish program leadership and time commitment to support mentors
- Establish program learning outcomes
- Define review and continuous improvement process (program leader responsible for changes)

ENROLLMENT / SELECT PARTICIPANTS

- Develop mentor pool
- Develop pairing protocols
- Develop enrollment process
- Establish duration of mentor-mentee cycle
- Communicate goals and roles to participants

GUIDE FOR DESIGNING YOUR PROGRAM

INSTRUCTIONS: *This worksheet is designed to assist the program leader in the development of their mentorship program. Answer the questions honestly and use this opportunity for reflection to guide the creation of a successful program.*

**What about your workplace culture would foster a successful mentorship program?
What aspect could pose a challenge?**

Who in your office would be a valuable addition to your initial workgroup?

**How will you set up your Continuous Improvement Process?
Consider how often you should meet with your participants and how often they
will complete the Continuous Improvement Template for you to review.**

**How will you structure the enrollment process?
Will there be a formal application process? If so, what would that look like?**

How will you reward participation in your program?

MENTORSHIP PROGRAM OUTLINE

This template can be used to develop your mentorship program. You can include this in your supporting materials when requesting support from your offices' leadership. Customize the fields noted in red with agency-specific information and adjust as needed.

[Agency Letterhead]

[Program Name i.e. Purchasing Agency Mentoring]

PROGRAM OBJECTIVES

List Program Objectives, such as cross-training institutional knowledge, onboarding, succession planning, retention, and recruitment.

Example: The goal of our mentorship program is to share institutional knowledge while concurrently providing the foundation of succession planning in our agency.

Application Process: Hopeful participants will complete a Pairing Questionnaire to pair them with a mentor who has similar communication styles and experience in the mentees' targeted area for growth.

Example: Mentee A prefers a "hands-off" approach and due to their schedule, does not wish to meet more than once a month. Mentee A will be paired with Mentor C who also prefers a "hands off" approach and cannot meet more than once a month due to time constraints.

Cycle Duration of Mentor/Mentee Relationship: Cycle lengths may vary on the intended goals of each pairing. As a matter of policy, the proposed cycle duration is _____.

Example: Best Practice suggests program lengths vary from 6 months to 1 year.

Reward: Allows participants to feel appreciated and encourages participation of others in future program cycles. Our program will reward participants by _____.

Example: Hosting monthly lunches with executive staff and program participants, as well as a celebration ceremony at the end of each cycle.

Note: There are lots of ways to reward participation in your program. Review Section III of this toolkit for a more in-depth explanation of the reward process.

Feedback Loop: The intended purpose of the feedback loop is continuous improvement. Participants will have a Continuous Improvement session every **two months** where they complete a worksheet crafted to spark critical thinking about the mentoring relationship. Participants will use it to guide a conversation between mentor/mentee. After the session is complete, Continuous Improvement forms are turned in to the program leader to be reviewed privately and program adjustments are made when needed.

FIRST MEETING AGENDA TEMPLATE

[Insert Date]

[Insert Time]

[Insert Dial-in Number for any remote attendees]

REQUIRED ATTENDEES:

- John Doe, Chief Procurement Officer (CPO)
- John Smith, Deputy CPO
- Director of IT Sourcing
- Assistant Director of Data Analytics
- Director, Services and Commodities
- Buyer 1 (New hire)
- Buyer 2 (New hire)
- Seasoned buyer 1
- Seasoned buyer 2

MEETING GOAL(S)

First working meeting of the mentorship team to discuss the mentorship initiative and get perspectives from all stakeholders involved. Group discussion about a rollout plan, implementation timeline, desired outcomes, roles and responsibilities.

ACTION REQUIRED: Preparation Materials

Please review the following materials prior to the meeting.

1. [Insert list of materials that need to be reviewed before the meeting]

AGENDA

- I. Welcome and introductions
- II. Background and scope discussion
 - Background for mentorship rollout and how it aligns with organizational goals
 - Present shared vision for the proposed initiative and expected benefits
 - Discuss the why
- III. Define objectives and responsibilities
 - Agree upon mentorship objectives
 - Who is going to participate, roles and responsibilities
- IV. Define desired outcomes
 - Where we need to be and how to get there
 - Discuss needed steps and activities
- V. Timeline and next steps
 - Discuss next steps toward implementation
 - Create timeline for implementation
 - Next group meeting

TEMPLATE FOR LETTER TO LEADERSHIP

Use the template below to request support from your office's leadership. Customize the fields noted in red with agency-specific information.

[Agency Letterhead]

[Insert Date]

[Insert Executive Leader's Name]

Chief Administrator

[Insert HR Director's Name]

HR Director

Address 1

Address 2

City, State Zip

Dear Chief Administrator/HR Director [Insert Name],

As the **state of [Insert State]** Chief Procurement Officer **[Insert Name of Central Procurement Office]** overseeing statewide procurement, I am requesting support for establishing a formal mentoring program in my office.

The **[Insert Name of Central Procurement Office]** provides cost-savings solutions to state agencies. It provides oversight for the procurement of commodities, as well as technical and professional services for all state agencies and acts in an advisory role capacity **[customize according to your governance and statutory authority, include additional roles and support to boards and commissions, colleges and universities, where applicable]**.

[Insert where applicable] Additionally, the **[Insert Name of Central Procurement Office]** is responsible for fleet management, the disposal of state surplus property and equipment and provides oversight for travel arrangements for state employees.

One of our agency's goals is to provide comprehensive training and career development opportunities to procurement professionals and other team members. This proposed mentorship program will pair seasoned employees with less-experienced team members to provide coaching, enhance their technical and soft skills, and help them succeed in their career.

Per the Bureau of Labor Statistics 2019 data rates for annual quits (voluntary separations initiated by employees) have seen an upward trend in the past 5 years, with a 10% quit rate for state and local government in 2019, compared to 8.2% in 2014. Implementing this initiative is expected to increase employee retention. As you know, employees who are offered coaching and learning opportunities are more likely to have successful careers and stay with the organization.

Enclosed is the **Program Outline [insert specific name of your program]**, which includes a high-level description of the proposed objectives, process, duration of the mentorship relationship, and reward process to help with your review.

I would be happy to set up a meeting with you to discuss the benefits of a mentoring program in further detail if that would be helpful. We look forward to your support!

Sincerely,

[Insert Name]

[Insert Title]

[Insert Contact Information]

Enclosures **[Attach your office's Program Outline]**

MENTORSHIP TOOLKIT

Section II: Beginning Your Mentoring Journey

SECTION II: BEGINNING YOUR MENTORING JOURNEY

This section includes steps and guidance for the mentor and mentee during the program implementation. Beginning the relationship and effectively navigating it is a difficult process, so we provided tools to help in your journey. A mentorship relationship can be incredibly fulfilling and help both partners achieve their career goals and experience personal growth. Tools provided in this section include:

- A set of two questionnaires for both the mentor and mentee; and
- A sample initial mentorship meeting agenda and professional development plan template.

Understanding Your Role

Mentors are exemplary members of the office who encourage life-long learning. With few exceptions, mentors are seasoned staff members with valuable experience and institutional knowledge to pass on to mentees. Given their key role in this process, mentors should meet with the program leader early on to clarify their responsibilities.

Mentees enrolling in the program are typically newer, less-experienced staff members eager to learn and embark on a professional development track. Mentees and mentors should be ready to tackle the professional development plan and mentees should speak openly with their mentors about their career goals.

Both mentors and mentees should schedule regular meetings to discuss their progress with the program leader, as well as address any difficulties that may arise.

THE MENTOR'S PERSPECTIVE

Interview with Kylie Carter, Senior State Procurement Officer and mentor in Illinois' program

Kylie discussed her experience acting as a mentor and shared some thoughtful advice. "Mentorship not only helps your mentee and office, but also yourself." She believes mentors need to make sure their mentees are included in on the details, so they don't miss valuable learning opportunities! "Taking the time to explain step-by-step what you do to accomplish a task and giving the reason for why you do it in that particular way can allow you to re-examine your own processes and possibly find different methodologies that are more productive! It is sometimes difficult to find the time in your day to teach someone else— but [...] it's all worth it in the end. Your mentee's success is a reflection on you as a mentor and your organization."

Understanding Participants' Learning Styles

When embarking on a mentorship relationship, it is important to identify each participant's personality differences. Some people may be more reserved while others are very forthright. Regardless of whether participants with different or similar personalities and styles are paired together, it important that they work with each other to create a productive relationship. Any preferences in terms of communication should be discussed in advance so that they do not affect the learning experience. There are free personality tests available online that both mentors and mentees can use to understand their personalities.

Below are a few examples of different types of personalities in the workplace and effective ways to work with them.

- **Detail oriented:** Individuals who are detail oriented tend to be data driven and prefer specificity. When working with someone who is detail oriented, set clear expectations and provide them with details.
- **Creative:** Creative people tend to focus on the big picture and prefer not to get into the details. Many times, they have unique ways of dealing with a problem and an out-of-the-box approach. When working with someone who is creative, give them an overview of the project and follow up with the details later.
- **Task oriented:** People who are task oriented prefer to have a plan when approaching a project and step-by-step guidance. When working with someone who is task oriented, be prepared to provide detailed answers and steps.
- **People oriented:** Individuals who are people oriented are very focused on relationships and tend to be good listeners. When working with someone who is people oriented, make time for personal conversations as this will improve your working relationship.

Entering the Mentorship Program

Some offices choose to use an application process to pair new hires or less-experienced staff with mentors who agreed to participate in the program. This toolkit offers a set of two questionnaires for both the mentor and mentee that can be used as part of the application process to help connect mentors with suitable mentees. These questionnaires will serve as a catalyst for the mentoring journey and allows mentees to define their needs and allow mentors to determine which prerequisites they can fulfill.

Conducting Mentor-Mentee Sessions

During the initial meeting, it is good practice to share information about personal communication, learning styles and discuss some of the information written on the initial pairing questionnaires. Once you share this information, it is time to discuss the terms and goals of your mentoring relationship. What should be the focus of your learning? What knowledge can you share?

We have provided an agenda template at the end of this section to help assist with discussion items for your initial mentor-mentee meeting. Your discussion items during your initial and subsequent mentor-mentee sessions may include:

- Timeline and frequency of meetings;
- Terms of the relationship; and
- The mentee's professional development plan and SMART goals.

During this first meeting it is important to establish expectations about your mentoring partnership. Will you discuss strictly work-related issues or help navigate interoffice constructs? Remember to define the information and challenges you discuss during these meetings, such as if they are strictly confidential or if the mentor can discuss the mentee's concerns with a supervisor when the situation calls for it. Remember, to avoid damaging the relationship, get permission before sharing personal information with others.

We have provided a simple template of a professional development plan to help identify the personal and professional goals you are working toward during the mentoring relationship. This can be used to guide communication as well as create a project timeline.

Creating SMART Goals

When creating your professional development plan, remember that not all goals are created equal. Professional goals should be specific enough to focus on the scope of work, but broad enough to have influence across an employee's encompassing job duties. Furthermore, goals should be realistically achievable to complete within the scheduled period of time. To help with the process of creating your mentorship goals, utilize SMART principles:

- **S**trategic: Choose goals that are specific to your individual development and aligned with the organization's mission
- **M**easurable: Can be qualitative or quantitative
- **A**chievable: Choose goals that are actionable and achievable
- **R**ealistic: Choose goals that are realistic and relevant to your individual plan
- **T**ime-bound: Choose goals that are tied to a specific timeline to allow you to focus on achieving them in a timely manner

A **SMART** goal in the context of a mentorship program could look like:

I want to focus on developing relationships with our end-user agencies. My goal is to increase the response rate to our quarterly customer satisfaction survey by 5 percent in the next six months. I will do this by reaching out to the agencies individually and prompting them to complete the survey and explaining how we are going to use their feedback.

Creating a Process for Continuous Improvement Feedback

To ensure the success of the mentor/mentee relationship, both participants must be willing to engage in open and honest feedback. To assist in this process, we have provided a Continuous Improvement Template designed to gather feedback to improve both your mentor/mentee relationship and the overall program. Periodically, participants should complete the form and utilize this to facilitate a conversation with their mentor/mentee about their relationship progress and any suggestions to improve the mentorship program. Once you have this conversation, these continuous improvement forms can be turned in to the program leader. The program leaders can then use the feedback to help guide the success of the program for future cycle participants.

Common Mentoring Relationship Obstacles and How to Address Them

Over the course of your mentoring relationship, you will likely run into some obstacles, especially at the beginning of your journey. It is important to address these as they arise to avoid damaging your relationship with your partner

Below are some common issues you may experience with your partner and how to address them.

Your partner may seem:

- **Distracted:** Your partner may have a hard time carving out uninterrupted time for your mentoring meetings and get distracted by emails and phone calls. If this is the case, try to meet in an available conference room or find a private area outside the office.
- **Reserved:** Your partner may have a hard time sharing their personal opinions or honest feedback. If this is the case, try to find common ground. Do you share an interest or a hobby? Make a personal connection. Prompt forthrightness from your partner by directly requesting their opinion and feedback and asking open-ended questions.
- **Uninterested:** It may seem like your partner has lost interest in working on your agreed upon goals or may be canceling your mentorship meetings. Begin making detailed agendas for each meeting to discuss your goals and check in with your partner about their workload – they may be in a particularly high-volume phase at the moment and unable to allocate the time to meet. They may be able to give you an estimate of when this high-volume phase will end.
- **Overenthusiastic:** Sometimes, your partner may have the best intentions but cross boundaries or demand too much of your time. Tell them how much you appreciate their time and effort and value your mentoring relationship. Reiterate your expectations of the relationship and share how you felt a boundary was crossed. Be specific. Your partner will not know how to correct the situation unless you give them concrete feedback. Do not merely give a generalization as they can be easily misconstrued.

Remember to first address your concerns with your partner. If you have had a conversation about the issue with your partner and it has not been resolved, then contact your program leader for support in remedying the situation.

Concluding Your Mentoring Relationship

The mentorship program should be a mutually satisfying experience for both mentor and mentee. As you are inching closer to the end of the established framework for the mentor-mentee session, set up some time to evaluate. Revisit the learning goals you created in your professional development plan at the beginning of the relationship. Have these been accomplished? Decide together whether you can still learn from your formal mentoring relationship. If you decide that you have progressed as far as you can together, talk to the program leader about concluding the sessions.

If you have not accomplished all your goals, what was the reason? If the designated time period has come to an end before you have reached all of your learning goals, share this with the program leader. It might be possible to renegotiate your end date as long as you are still learning from one another.

Reflect on all you have learned throughout your journey and express gratitude for the role your partner has played in your growth. Remember, just because the formalized portion of your relationship has come to an end does not mean that your partner cannot still provide support and guidance in an informal way. This is not the end of your relationship but merely the end of your program participation.

MENTORSHIP TOOLKIT

Section II: Proposed Templates

CONTINUOUS IMPROVEMENT TEMPLATE

INSTRUCTIONS: Now that you and your partner are meeting regularly, reflect back on your growth and development with the questions below. Discuss at your next meeting and turn in to the program leader. This is valuable data that can improve your relationship, and the mentorship program as a whole.

During the mentoring process, what have you identified as your personal strengths? What are some areas to improve upon?	
STRENGTHS	IMPROVEMENTS
<ul style="list-style-type: none">•••••	<ul style="list-style-type: none">•••••

In what ways are you developing as a result of this mentorship?

In what ways can you improve this relationship?

What extra support, guidance, challenges or experiences could you benefit from right now to continue your growth?

SECTION II CHECKLIST

In this phase, we discuss how to prepare for the mentee/mentor role and relationship; negotiate standards of acceptability for the mentor/mentee relationship; and use program goals to define success metrics.

- Mentor and mentee applications have been collected

- Mentor pool is built

- Program accounts for participants who may be at different educational and training levels in your organization

- Selected mentor/mentee pairings have been made

- Sample meeting schedule has been prepared for participants including clear expectations for frequency of meetings

- Professional development plan has been made by both the mentor and mentee

- Agreed-upon metrics for measurement of progress have been established and communicated to program participants

- Communicate consistently and regularly to all program stakeholders (office leadership, program participants, program leader)

- Mentoring partners are encouraged and supported to take time for mentoring

- Confidentiality between pairings is safeguarded in program planning; and encouraged and communicated in program materials

MENTEE QUESTIONNAIRE

INSTRUCTIONS: *The exercise below can be used to help the program leader match you with a mentor that best fits your interests and professional development needs. Answer the questions below to the best of your ability, remaining open and transparent. Review the “tips for a successful relationship” before answering the questionnaire.*

Principles of a successful relationship

- **Cultivate**—Work hard to develop a trusting relationship with your mentor. This should be a safe place to express excitement as well as frustrations. Remember that you will get out what you put into this bond.
- **Feedback**—Understanding the value of feedback is crucial to improving the process. This will allow mentors the chance to improve their mentoring style and gives the mentee the opportunity to be heard.
- **Inquire**—Ask questions. Chances are, you will be in similar (if not the same) situations your mentor has experienced. Don't be afraid to ask questions in the safe space you have cultivated together. You are here to learn. Use the feedback you get from the mentor to improve your professional skill set.
- **Honesty**—Forge a mutually beneficial relationship. If you feel the relationship is one-sided, or your mentor is not pulling their weight, bring it up in your next meeting. If the problem persists, consider bringing this up with the program leader.
- **Respect**—Be respectful to your mentor. You have both volunteered to be a part of this; treating each other with mutual respect will go a long way in accomplishing your goals.

1. Please select all that apply from the following statements.

- I prefer a hands-on approach to learning.
- I prefer to give resources and answer questions as they arise.
- I am direct in my communication with others.
- I carefully choose my words when I offer constructive feedback.
- I take breaks by engaging in small talk with my coworkers.
- I take breaks by taking a solo walk around the building.
- I will remember anything you write in an email.
- I will remember anything you say in a meeting.
- I am told I am a good listener.
- I prefer to work in groups.
- I prefer to work by myself.

2. The specific competencies I want to learn are:

3. Ideally, I'd like to meet _____ .

- a. Once or twice a week
- b. Bi-monthly
- c. Monthly

4. It would be acceptable to give my mentor my personal phone number.

- a. Yes
- b. No

5. Do you have someone in mind you would like to be your mentor? If so, who?

6. Describe a particular area or challenge with which a mentor could assist you.

MENTOR QUESTIONNAIRE

INSTRUCTIONS: *The questionnaire below can be used to help the program leader match you with a mentee that best fits your competencies, skills, and interests. Answer the questions below to the best of your ability, remaining open and transparent. Review the principles before answering the questionnaire.*

Principles of a successful relationship

- **Cultivate**—Work hard to develop a trusting relationship with your mentee. Create a safe place to express excitement as well as frustrations. Remember that you will get out what you put into this bond.
- **Feedback**—Understanding the value of feedback is crucial to improving the process. This will allow mentors the chance to improve their mentoring style and gives the mentee the opportunity to be heard.
- **Inquire**—Ask questions. Chances are, you will be in similar (if not the same) situations your mentee will experience. Don't be afraid to ask questions in the safe space you have cultivated together. You are here to learn. Use the feedback you get from the mentee to improve the mentoring relationship and learning experience. Your mentee may surprise you, coming up with a more efficient way of doing things.
- **Honesty**—Forge a mutually beneficial relationship. If you feel the relationship is one-sided, or your mentee is not pulling their weight, bring it up in your next meeting. If the problem persists, consider bringing this up with the program leader.
- **Respect**—Be respectful to your mentee. You have both volunteered to be a part of this; treating each other with mutual respect will go a long way in accomplishing your goals.

1. Please select all that apply from the following statements.

- I prefer a hands-on approach to teaching.
- I prefer to give resources and answer questions as they arise.
- I am direct in my communication with others.
- I carefully choose my words when I offer constructive feedback.
- I take breaks by engaging in small talk with my coworkers.
- I take breaks by taking a solo walk around the building.
- I will remember anything you write in an email.
- I will remember anything you say in a meeting.
- I am told I am a good listener.
- I prefer to work in groups.
- I prefer to work by myself.

2. The specific competencies I want to pass on are:

3. Ideally, I'd like to meet _____ .

- a. Once or twice a week
- b. Bi-monthly
- c. Monthly

4. It would be acceptable to give my mentee my personal phone number

- a. Yes
- b. No

5. Do you have someone in mind you would like to mentor? If so, who?

MENTEE PROFESSIONAL DEVELOPMENT PLAN

INSTRUCTIONS: *This template can be completed with your mentor during your meetings to determine the goals for your relationship moving forward.*

Goal #_____:

- Work/education related activity:

- Related Project(s)
 -
 -
 -

- Benchmark(s)
 -
 -
 -

- Completion Date:

Objective:

Objective:

Objective:

SETTING THE AGENDA: INITIAL MEETING

INSTRUCTIONS: *Starting out can be difficult, especially when you are virtually strangers. These suggested agenda items can help with the mentor-mentee conversation during your initial meeting. The itinerary is built to guide you through an hour-long discussion and establish a 'safe' place for you and your mentoring partner to return to. Remember to talk, but more importantly, LISTEN.*

Get acquainted – Make an effort to get to know one another. Try engaging with your mentee through similar interest (i.e. sports, hobbies, music) establishing a comfortable environment.

NOTES:

Discuss past experiences – Exchange stories, prompting your mentee to share past experience. This may help you gain insight into what experiences have worked well for them in the past, as well as things to avoid in the future.

NOTES:

Identify learning outcomes – Discuss your mentee’s long-term professional goals, as well as their short-term ones. Decide what you two can accomplish during your time together that will contribute to a symbiotic relationship.

NOTES:

Define expectations – Establishing expectations will allow you both to get a grip on the work ahead. Knowing what you expect from one another, as well as what you hope to gain out of your time together can help to keep you goal oriented.

NOTES:

Discuss how you learn and work best – Identify your communication and learning styles and share how you best receive feedback. Personality tests can be a fun way to gain insight into how you will best work together.

NOTES:

MENTORSHIP TOOLKIT

Section III: The Program Leader's Role in the Mentorship Program

SECTION III: THE PROGRAM LEADER'S ROLE IN THE MENTORSHIP PROGRAM

As the program leader, you are one of the key players in the mentorship program. During Section I we address how to create a mentorship pool, pair protocols and establish meeting frequency. In this section, we focus on your role during the mentorship period; how to monitor progress, gather feedback, address common problems and refine your mentorship program in the future. Your active participation throughout the program ensures the mentors/mentees feel supported through their journey and helps bolster your program's initiatives.

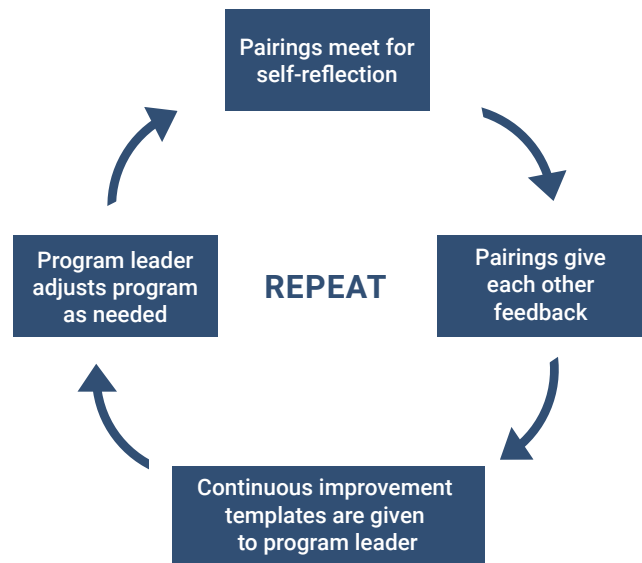
Monitoring Progress

It is your responsibility to monitor the progress of your mentorship pairs in order to ensure your program is a success. Check in with your mentors as well as your mentees on a periodic basis, possibly quarterly throughout your program, to ensure that they are making progress toward their learning goals.

Gather Feedback and Integrate into the Feedback Loop

Fostering the mentorship mentality means encouraging pairings to communicate frequently with each other, as well as share their progress with you. As the program leader, your aim should be to encourage open, honest feedback about the mentorship pairings, learning goals and overall progress.

It is essential to incorporate a feedback loop into the program. To aid you in this, we have provided a Continuous Improvement Template. Best practice suggests having mentors/mentees complete these templates individually and bring them periodically to a designated "reflection" meeting. Encourage the pairs to use their completed template to guide their conversation related to growth made toward the outlined learning goals. Once the meeting has concluded, the pairings should turn in their completed reflection forms to the program leader. This allows the program leader to make any needed program adjustments drawn from this feedback. This feedback loop repeats itself each time pairings meet for self-reflection during a program cycle.



Addressing Issues that Arise

Every program will experience a few stumbling blocks over the course of time. Don't get discouraged! Proactively addressing these stumbling blocks ensures that these do not become insurmountable obstacles for either participants or endanger the success of your program.

These are some common stumbling blocks that you are likely to encounter throughout the life of your program:

- **Misunderstandings between mentor/mentee:** Throughout the course of their relationship, and particularly while they are navigating the initial phase, misunderstandings may arise between the mentor and mentee. Most of the time, they will be able to address these difficulties between themselves. However, it is possible that in some cases you will need to step in and act as a mediator and facilitate a productive conversation.
- **Overextending the mentor/mentee:** When your employees have many responsibilities, it is possible that the timeline you suggested is untenable for that mentorship pair. Listen to feedback from your mentors and mentees and adjust the timeline as needed to fit within their time constraints.
- **Improper mentorship pairings:** Occasionally, it is possible to incorrectly pair a mentor and mentee. However, you must distinguish the difference between insurmountable obstacles versus issues that can be resolved. If you determine that the relationship will not develop productively, consider pairing them with another partner that may be a better fit.

Awarding Participation

Reward is a powerful motivator. There should be a reward phase of your program. In times of fiscal conservativeness, raises are not always an option. However, it is important to celebrate the participation in your formal mentorship program and reward the time and effort of the participants. Awarding participation will not only make your mentors/mentees feel appreciated but will also encourage participation of other employees in future cycles. When determining how to award your mentor/mentees consider, “What reward or celebration would be meaningful to your organization?”

A few different options for rewarding participation include:

- A graduation ceremony
- Visible signals, such as framed certificates, plaques, and buttons
- Providing lunch for program participants
- Offering a “Mentor/Mentee” Agency certification

Whatever way you choose to celebrate your program participants, just make sure that you do. This phase of the program cycle is often overlooked and can lead to a lack of involvement or apathy toward your program.

Evaluate the Success of the Program

Program evaluation differs from the incremental changes you made during the feedback loop. Program evaluation involves the realignment of learning goals, policies and assists in identifying main priorities for the next program cycle.

Once you have concluded the formalized aspect of your mentorship pairing, have a meeting with both the mentor and mentee. Listen to their journey throughout the program and specifically ask how the program can be reformatted to meet the needs of future mentors/mentees. Remember to listen with an open mind and thank them for their honesty. After you collect this feedback and identify your priorities, refer back to Section I of this toolkit to help guide the process of making the necessary revisions to your program.

CELEBRATE GOOD TIMES!

2019 NASPO President and State of Georgia CPO Lisa Eason knew that her employees’ involvement in the Leadership Academy was something worth celebrating. Lisa wanted to inspire the best in her employees and let them know that she was watching and listening to those who show initiative. Lisa organized lunches between Leadership Academy participants and members of executive leadership to allow the participants to interact directly with and be heard by executive leadership. When they complete the Leadership Academy, she hosts a graduation ceremony to celebrate their success and hard work. Lisa’s celebration inventiveness adds value to her program and encourages the participation of future employees.

MENTORSHIP TOOLKIT

Section III: Proposed Templates

PROGRESS CHECKLIST

INSTRUCTIONS: *In this phase, we discuss how the program leader oversees the mentee/mentor relationship and ways to come to closure.*

Periodically review the checklist below to guide your progress.

- Make time to meet regularly with your mentorship pairings
- Review mentoring relationship learning goals periodically
- Review Mentor/Mentee Continuous Improvement template as needed
- Set aside time for feedback about the mentor relationship and progress toward learning goals
- Stumbling blocks have been addressed and solutions are identified
- Utilize established feedback loop
- Determine if your mentorship pairs have met all learning objectives and if the formal mentorship relationship is ready to conclude
- Hold an exit interview to receive feedback about your program
- Celebrate the conclusion of the mentorship

CONCLUSION

A formal mentorship program can have a positive impact in your office and can address issues with retention and sharing of institutional knowledge within your agency. Mentorship can also increase the feeling of inclusion in the office and increase employee satisfaction. Mentorship programs are a relatively low-cost professional development opportunity for your employees and can be a win-win situation for both the employees and agency as a whole.

The program leader should be heavily involved in the design aspect of the mentorship program. The program leader must work to negotiate support from agency leadership, encourage the visibility of the program, and build a work group dedicated to advancing the agency's goals by aligning them with goals for a mentorship program. This type of intricate planning is crucial to the success of your program.

After the mentorship program is designed, the mentors and mentees begin creating their relationship. A formal application process can help pair mentors with suitable mentees. During the initial phase, negotiate expectations and boundaries, create your learning goals, and learn how to navigate learning style differences. Remember to periodically complete the Continuous Improvement Templates and submit them to the program leader.

While the mentor and mentee engage in the mentorship journey, the program leader is tasked with implementing a feedback loop. The feedback loop is how a formal mentorship program can continue to grow and adapt to the issues facing the modern public procurement office. Designed to address issues before they become obstacles, a feedback loop allows for continuous improvement in the program. Renegotiating timelines, mentoring goals and mentor/mentee relationships are all part of a successful feedback loop. Periodically collect the Continuous Improvement Templates from the mentor/mentee and re-evaluate your process. Lastly, conduct a formal exit interview to gain insight into how to improve your program for the next mentoring cycle.

The key players of a mentorship program are the program leader, mentor and mentee. Communication between all parties is key. Open and honest feedback encourages the success of your mentorship program. This success ensures the longevity of the program and has numerous benefits for your organization.

If you would like more information about the creation of a formal mentorship program in your procurement office, reach out to NASPO. We will be happy to provide you with more advice and resources to assist you in your journey.

¹Branch, S. (1999, January 11). The 100 Best Companies to Work for in America. *Fortune*, 118-130. ; Allen, T. D., Eby, L. T., Poteet, M. L., Lentz, E., & Lima, L. (2004). Career Benefits Associated With Mentoring for Proteges: A Meta-Analysis. *Journal of Applied Psychology*, 89.