

# How to Build a Mentoring Program

A Mentoring Program Toolkit

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**USPTO**  
LEADERSHIP DEVELOPMENT PROGRAM  
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# Mentoring Program Toolkit Overview

This toolkit is designed for use by any USPTO voluntary employee organization to assist them in starting up and maintaining an effective formal mentoring program. It was developed by the Office of Human Resources, Enterprise Training Division to be one of many resources available through the USPTO Leadership Development Program. Elements of this toolkit are based on best practices research of successful government and private sector programs. Lessons learned from the successful implementation of mentoring programs within the Office of Human Resources and the Patents Business Unit is also incorporated.

This toolkit will save the user time and effort, because it includes resources that support the roles of mentoring program managers, mentors, mentees, and organization stakeholders.

This tool kit is divided into eleven major sections which outline the major steps in the process of developing a successful program (a quick-start guide to the steps begins on the next page). Each section contains corresponding tips, tools, techniques, and advice presented in a practical, how-to manner.

By following the steps outlined in this toolkit, you should be able to develop an effective mentoring program.

# Quick-Start Guide

You can build an effective mentoring program by following the steps outlined below and on the next page. Detailed information is on the page numbers identified in parentheses next to each step

**Step 1: Identify the program manager and the senior level champion** (pages 8-9)

- Appoint someone to act as program manager who will oversee the development, implementation, and evaluation of the program (steps 2 through 11).
- Ensure the program manager is familiar with the mentoring program toolkit and has the time and resources to accomplish the responsibilities of the role.
- Secure a senior level champion who will communicate the purpose and need for the program to the organization's stakeholders, obtain their support, and ensure that the benefits are understood across the organization.

**Step 2: Identify the purpose of the program** (page 10)

- Determine what you want the program to accomplish or what you want the mentees to know or be able to do when they complete the program
- Determine how you will measure the success of the program

**Step 3: Identify the intended mentors and mentees** (pages 11-14)

- Review your program purpose to determine your mentee pool (who is in need of this program?)
- Identify members with the most knowledge, skills, and experience to share to act as mentors

**Step 4: Create a program implementation action plan** (page 15)

- Determine critical activities necessary for program development and implementation
- Set realistic milestones and due dates
- Appoint responsible parties for each major activities

**Step 5: Establish the program approval process** (page 16)

- Decide which stakeholders need to approve program components (materials, activities, plan of action and milestones, and implementation).
- Establish the steps for obtaining approval of each component.

**Step 6: Establish policies, procedures, and responsibilities** (pages 17-21)

- Determine how long the formal mentoring pairings will last (i.e., 6 months, 1 year, etc.)
- Establish the roles and responsibilities for the senior level champion, program manager, mentors, mentees, and stakeholders.

**Step 7: Schedule activities to support mentors and mentees** (pages 22-23)

- Determine if an Open House, special information session, or similar event is needed to help promote the program.
- Identify activities that will require assembling all of the mentors and mentees (i.e., orientation session, team-building exercises, mid-year review, guided discussions, guest speakers, field trips/tours, graduation, etc.).

## Quick-Start Guide, *continued*

### **Step 8: Create program documents and resources** (page 24)

- Create the application forms, mentor/mentee agreement forms, activity logs, and evaluation forms.
- Establish a library of materials and resources to assist mentors and mentees during the program. Examples include how-to guides, job aids, and recommended reading materials and websites.

### **Step 9: Develop a communications strategy** (page 25)

- Assess current methods for communicating to your members.
- Determine how will you promote and advertise the program and provide information and updates to your members (i.e., in person, print, web, email).
- Establish how and to whom you will report on the progress/success of the program.

### **Step 10: Train and educate the mentor and mentee pool on aspects and benefits of the mentoring program** (pages 26-27)

- Conduct an Open House, if applicable, or invite potential mentors and mentees to special information sessions, or both.
- Use established communication methods to deliver information to potential mentors and mentees to encourage participation.

### **Step 11: Implement and evaluate the program** (page 28)

- Solicit/receive/review/approve applications.
- Create mentor/mentee pairings based on compatibility from application forms.
- Conduct an orientation session.
- Conduct planned activities.
- Conduct a completion (graduation) ceremony.
- Evaluate each step of the implementation.
- At the conclusion of the completion (graduation) ceremony, conduct an overall program evaluation with the mentors and mentees.
- Conduct a follow-up evaluation about three months after the completion (graduation) ceremony to measure the success of the program.

## **Step 1: Identify the Program Manager and Senior Level Champion**

### **Program Manager**

#### **What does the program manager do?**

The responsibilities of the program manager are as follows:

- Develops and implements the Plan of Action and Milestones
- Recruits participants
- Educates and trains participants
- Writes or drafts policies and rules
- Develops program materials
- Matches mentees with mentors
- Evaluates the program

#### **Who should serve as the program manager?**

The person selected as the program manager should be someone who possesses:

- Knowledge of the organization's mission, vision, and goals
- Knowledge of how the organization is structured
- Excellent time and project management skills
- The ability to meet deadlines
- Excellent written and oral communication skills



## Step 1: Identify the Program Manager and Senior Level Champion

### Senior Level Champion

#### What does a senior level champion do?

The responsibilities of the senior level champion are as follows:

- Communicate the purpose and need for the program to the organization's stakeholders
- Obtain and maintain the support of the organization's stakeholders
- Facilitate the communication of the benefits of the program to all members of the organization
- Facilitate or provide approvals for the program's policies, rules, plan of action, and materials

#### Who should serve as the senior level champion?

The person who will serve as senior level champion should:

- Be a senior level member in the organization
- Be a respected member on the organization's most senior board or committee
- Be committed to achieving the purpose and goals of the mentoring program

## Step 2: Identify the Purpose of the Program

### **Before planning any aspect of the program, you must first determine:**

- What you want the program to accomplish
- How you will measure success

### **To help determine the purpose, ask yourself the following questions:**

- Are our less experienced members performing below expectations?
- Do we want to increase the technical knowledge of our members?
- Do we want or need to provide overall personal and/or professional growth opportunities for our members?
- Do we want or need to develop the knowledge and skills of our less experienced members to ensure the growth and health of our organization?

### **To help determine how you will measure the success of the program:**

- Identify stakeholders and their interests
- Establish goals and outcomes
- Establish measures for outcomes

### **Here are some sample program purposes (or goals) to help guide you [your program can have more than one purpose or goal]:**

- Support new members in understanding the organization's mission, vision, values, and goals.
- Share the skills and knowledge of successful and experienced members with new members.
- Provide support in locating and accessing organizational resources and resource people.
- Foster open communication and dialogue.
- Provide motivation for job performance, creativity, and innovation.
- Bring employees together to establish a network of professionals.

## Step 3: Identify the Intended Mentors and Mentees

### Mentors

Development of your mentees depends on exploring career aspirations; strengths and weaknesses; collaborating on means to “get there”; implementing strategies; and evaluating along the way. The mentor provides the “light” for the mentee to follow. Sharing wisdom and past experiences is what the mentee looks for from the mentor.

Ideally, a mentor should be able to:

- Explain how the organization is structured
- Be respected as an experienced and successful professional in the organization
- Support the organization’s mission, vision, and goals
- Stay accessible, committed, and engaged during the length of the program
- Listen well
- Offer encouragement through genuine positive reinforcement
- Be a positive role model
- Share “lessons learned” from their own experiences
- Be a resource and a sounding board

You should develop some criteria to determine who should be in the mentor pool. Below and on the following page are some possible selection methods. Using a set of criteria can work well, and you should be careful to avoid conflicts between criteria or the use of criteria that cannot be used during certain times of year when people might be unavailable. And do not confuse the **selection** of mentors with the **matching** of mentors and mentees. Matching is covered later in this toolkit.

### Mentor Selection Methods

- **Use Career Levels:** As in, "**Your Career Level** must be at least level X..." If your organization already uses a structure such as pay grades, years in the organization, certification levels, responsibilities, or job titles which define job levels, these are likely to contain some inherent criteria for which there is general acceptance and which can be used to simplify the mentor selection process. For example: "To be a mentor, you must be at least one pay grade above the lowest graded person who could be your mentee."
- **Use Number of Years of Recent Experience in the Job:** Typically, a minimum of five years experience in the specific job and at that location are required of mentors. Requiring a greater number of years could exclude some of your most enthusiastic and currently trained people. You should only require a greater number of years if your organization is structured where members need more than five years to attain a mastery level and to be considered as suitable mentors.

### Step 3: Identify the Intended Mentors and Mentees

- **Use Peer Recommendations.** Peer recommendation should be made based on a judgment that the candidate has desired characteristics which the mentor program has defined. If this is done well, you will be asking the very people who know who the best members are and non-participants will eventually look at who the mentors are and say "He/She is a good member/worker/employee and *should* be a mentor."
- **Use a Self-Nomination Process:** This is one of the best methods if carefully structured. For example:
  - Define a major mentor responsibility to be that of modeling continual learning and growth, which requires tolerance for ambiguity and a willingness to seek and accept feedback from others about the best performance and practices.
  - Hold a Mentor Program Informational Meeting at several points during the year for any interested mentoring candidates. Require all mentor candidates to attend one of these (making them optional is acceptable, but less-preferred). Explain how the program will work, how the role of the mentor is defined, and what mentors are expected to do. Acknowledge that not everyone will choose to serve in this role for a variety of reasons and that matches with appropriate mentees may sometimes be difficult to attain.
  - Tell the candidates: "If you will be uncomfortable or displeased when a more junior member asks you to explain your decisions, or to justify why you do a specific practice, then you should probably not become a mentor."
  - If a person applies, and you wonder about their ability to be an effective mentor, it still might make sense to allow them to attend the mentor training. They may learn a lot, and may, given more information about mentoring, decide not to become a mentor after all. Even if the questionable person goes through with the training and still seeks a mentoring assignment, it is possible to deal with it by saying "the ideal match for a person with your unique strengths has not been found."

Here are some more tips that will help you successfully select your mentor pool:

- **Create face-saving ways to opt out:** Create ways in which people who are mentor candidates can decide, at any step in the selection process, that now is not the time to become a mentor and choose to remove themselves from the process. That can be accomplished by describing up front what becoming an effective mentor involves, then suggesting that those who would be uncomfortable doing those things should consider withdrawing their candidacy, at least for now.
- **Don't create too rigid of a selection process:** Allow for flexibility. Let those who are interested in learning more about the mentor program know they can come to an informational meeting to hear about mentoring and that they may opt out at any time they wish. This is critical because some of the less desirable candidates will self-select out of the selection process when the role of the mentor and the expectation of modeling learning for others is understood.

### Step 3: Identify the Intended Mentors and Mentees

- **Don't make too many promises about what attending mentor training means:** People should understand that being trained as a mentor DOES NOT mean they will automatically be assigned to work with a mentee. The point is to match the strengths of the mentor to the needs of the mentee. This means that some employees who become trained mentors may find that they are never matched because the program can not find a mentee whose needs are matched to the strengths of the mentor.

## Step 3: Identify the Intended Mentors and Mentees

### Mentees

The mentee's development depends on exploring career aspirations; strengths and weaknesses; collaborating on means to "get there"; implementing strategies; and evaluating along the way. The mentor will provide the "light" for the mentee to follow. Learning from the wisdom and past experiences of the mentor will serve the mentee well and produce great benefits.

Ideally, a mentee should be able to:

- Commit to self development
- Assume responsibility for acquiring or improving skills and knowledge
- Discuss individual development planning with their mentor
- Be open and honest on their goals, expectations, challenges, and concerns
- Actively listen and ask questions
- Seek advise, opinion, feedback, and direction from their mentor
- Be open to constructive criticism/feedback and ask for it
- Respect their mentor's time and resources
- Stay accessible, committed, and engaged during the length of the program
- Comfortably give feedback to their mentor on what is working or not working in the mentoring relationship

## Step 4: Create a Program Implementation Action Plan

The program manager must:

- Determine critical activities necessary for program development and implementation
- Set realistic milestones and due dates
- Appoint responsible parties for each major activity

Critical activities are those conducted in steps 5 through 11. Based on the needs of the organization, additional activities can be accounted for in the action plan as well. And some activities covered in steps 5 through 11 may be combined if necessary.

Setting realistic milestones and due dates for the activities to be accomplished is essential to the success of the program. You should determine how long similar activities have taken to be approved and implemented when deciding on the best due date for each activity. Activities that require approval to the highest board or committee of the organization should typically be given more time than activities for which the program manager needs no approval to accomplish.

The program manager will be responsible for accomplishing most of the activities. However, depending on the structure of the organization, other individuals may be assigned some of the responsibilities.

## Step 5: Establish the Program Approval Process

Every organization has its own approval process. The program manager and senior level champion should work with the organization's leadership to determine which activities should be approved at various levels within the organization. A good approach is for the program manager to work with the senior level champion to develop an approval process for each critical activity and submit it to the organization's leadership for approval.

Policies and communications strategies should typically be approved at the highest level of the organization. Activities such as workshops, meetings, and training sessions can be left to the program manager and senior level champion to approve. Program documents can also be left to the program manager and senior level champion to approve, unless the documents are designed to capture personal information about the mentees and mentors. In which case, a higher level person or office in the organization may need to provide approval.



## Step 6: Establish Policies, Procedures, and Responsibilities

Your mentoring program should have formal policies, procedures, and responsibilities in place to ensure the purpose and goals are met.

At a minimum, you should establish policies and procedures for the following

- Duration of the mentoring relationships
- Whether participation in mentoring program group activities is mandatory or optional
- Matching (mentees to mentors)
- Dealing with a Mentee-Mentor Mismatch
- Closure (of the mentoring relationships)

### Duration of the mentoring relationships

Formal pairings need time for the relationship to develop. Pairings should last at least six months. Although mentoring relationships can be effective for several years, you should limit the formal pairing within the program to no more than one year. Information on continuing the relationship beyond the formal pairing is on page ??.

### Participation in mentoring program group activities

Your mentoring program may choose to conduct group activities to enhance the relationships and provide continuing support to mentees and mentors. If you do, you must determine if mentees and mentors are required to participate in them. Activities such as an orientation session, graduation ceremony, and mid-year review are probably best to be made mandatory. Activities such as guest speakers, group discussions, and field trips are probably best to be made optional. Review the purpose and goals of your program to determine which activities need to be mandatory.

### Matching

Typically, during recruitment a mentee will be asked for information that would help the organization, and specifically the mentoring program manager, to identify:

- The mentee's areas of strength as a professional
- The mentee's possible areas of need for further professional growth
- The mentee's preferences for the kind of person with whom they would like to have as a mentor
- The mentee's office/work location
- The mentee's job assignment or the future assignment for which they are being prepared.
- And other factors which might influence matching with a prospective and appropriate mentor.

Those and other areas should be considered in matching the mentees to a mentor.

**Establish a set of mentee-mentor matching criteria, incorporating the following priorities:**

- Degree that the mentor's strengths match the mentee's needs
- Similar job assignments or duties
- Close proximity
- Common free time

## Step 6: Establish Policies, Procedures, and Responsibilities

While it's very important to match a mentee with a mentor based on needs and strengths, you should ensure that mentees are matched with mentors who are easily accessible and available. A major part of mentoring is frequent informal opportunities to chat, so put mentors and mentees together in situations in which informal time is available. If mentees have limited access to their mentors, they may find it easier to seek the advice and informal mentoring of people nearest them, and those people may not possess the mentor traits appropriate for the program purpose and goals.

An optional criteria is age or level of experience, or both. Some people will prefer being mentored by someone who is older than they are. Others will be more concerned about what a potential mentor can provide them, regardless of any age difference. Take this into consideration, and speak with any mentee about their position on the subject if you believe the best mentor is someone the same age as or younger than the mentee.

Also, matching mentees with mentors who have identical personality types, work styles, or philosophical views can sometimes hinder achieving the goals of the program as it can minimize the learning opportunity which is the whole point of the mentoring relationship. To learn from someone else, it's often best if they see things differently than we do. Otherwise, the mentee and mentor may have a relationship with no discoveries, no challenges, and little growth.

## Step 6: Establish Policies, Procedures, and Responsibilities

### Dealing with a Mentee-Mentor Mismatch

Matching mentees with mentors is not an exact science. And despite your best efforts, mismatches can occur, albeit infrequently. And they are something you must be prepared for.

Do not use negative words such as “poor” or “bad” to describe the mismatch because they can be perceived as placing blame on the mentee or mentor. Instead, use the term “mismatch” which places the responsibility on the process or program. Here are some proactive steps you can take to prevent problems associated with mismatches.

- Point out when you ask a person to be a mentor and again in the initial mentor training that mentee-mentor matching is an inexact science.
- Explain that it is reasonable to assume that as more is learned about the needs of the mentee that, in a few cases, it will become clear that the wrong match was made and it is no one's fault.
- Explain that the program has a no-fault divorce policy because it is primarily focused on effectively addressing the needs of the mentee. If what was planned does not address those needs, a new match makes good common sense.
- Point out that this does not mean that a mentor is a bad mentor. It is assumed that all mentors are strong employees. What it does mean is that the mentor's strengths were not those needed by this specific mentee.
- It is also assumed that all mentees will be open to mentoring and defer somewhat to the experience and wisdom of their mentor. If this is not the case, a new match may help and the change would be more about the mentee than it is about the mentor.
- Repeat the same message to mentees when they are told they will have a mentor and when they are together at any orientation meetings.
- Be sure to emphasize that there will be a mismatch check with every mentoring pair. This is vital so that if it becomes necessary to discuss a mismatch, the people will not feel "singled out".
- Conflicts are a natural result of putting diverse people together and asking them to work as partners. If a mentoring pair can work through conflicts by valuing how diverse they are, the richness of their different view points, background, and experience, then they can learn a great deal more from each other, precisely because they are not thinking the same way. Seen from this perspective, differences can be a strength, not a weakness of any relationship.

### Plan a Mismatch Check About One Month After Mentoring Starts

Plan on separately checking with every mentee and mentor starting about a month after mentoring has started. Inquire as to whether they feel their mentoring match is as effective as it needs to be. Ask the mentee first, and if you get an indication of a problem, don't assume it's time for a change, and don't create an expectation of any specific kind of solution as of yet. You have only a part of the whole picture. promise to quickly investigate the situation, and to facilitate a "resolution". Then check with the mentor, first asking for their feelings about the usefulness of the match before sharing any mentee concerns.

When one member of the pair says the match is not working, explore the reasons and decide if:

- The problem can be resolved, or at least if an attempt to resolve it is needed.
- A new match is needed.

## Step 6: Establish Policies, Procedures, and Responsibilities

### Discussing the Possibility of a Mismatch

Repeat the same message (no fault, etc.) when discussing a possible mismatch as was given when the original match was made. Your purposes are several:

- You want to ensure that the best support is provided to every mentee
- You want to dissolve ineffective matches as early as possible, and create a better situation
- You want to end inappropriate matches but without doing damage to the dignity of either party

### Dissolving the Mismatch

When it is apparent that a mis-matched relationship must be dissolved, ensure the problem is placed on the program matching criteria and not the mentee and mentor.

Speak with the mentee and mentor separately. Sample starter dialogue is below.

To the mentee, say:

“When we (the program) originally made the match, we did so as soon as we could. We did that because we believe that mentees deserve mentoring support as quickly as possible. Had we waited until we had all the information we have now, you (the mentee) might of had no support once the program started. We believe that's not right. We are working to find another mentor for you.”

To the mentor, say:

"It would not be fair to you or useful for the mentee or for our program to keep a mentor matched to a mentee who does not need the specific strengths and experience that you (the mentor) have to offer. That's why we are seeking a different mentor for your mentee. When we can find a mentee whose needs match your specific strengths and experience, we will certainly ask you to be a mentor again and to mentor that person."

## Step 6: Establish Policies, Procedures, and Responsibilities

### Closure

When the pre-determined end date of the formal mentoring program has been reached, the formal mentoring pairings can be dissolved. However, that does not mean that the mentoring pairs cannot continue an informal (or formal) mentoring relationship. Learning is a life-long, continual process. Mentees and mentors should be continual learners, even after their formal relationship comes to an end.

You should prepare for closure at it relates only to the formal end date of the program. Focus on transitioning the mentoring relationship rather than ending it.

You should allow for and encourage the mentoring relationships to transition to at least one of the following forms:

**From Formal to Informal:** If goals weren't achieved during the structured period or if new goals were identified, the mentoring pair should be encouraged to continue their relationship on an informal basis if that is what they each feel will be most beneficial.

**Transition to a Different Partner:** Some mentees may wish to be mentored by someone in a different career field or feel there are no more benefits to be gained by remaining with the same mentor. This happens and is okay. This transition could be informal or it could be part of the next formal mentoring program you conduct.

**Transition to Peer Coaching:** The mentoring pair may shift into a peer coaching relationship where they support each other's professional growth.

### Natural Points of Closure

You should anticipate and allow for natural points of closure. Some mentoring relationships will end before the pre-determined end date of the program. As discussed on page 19, some relationships end because of a mismatch. Others will end because the mentee and mentor have achieved all of their desired goals and mutually believe there are no more benefits to be gained by continuing the relationship. When that happens, the program manager should be in agreement that the relationship should end and should allow for and facilitate an appropriate transition for the mentee and mentor.

Some relationships will end early because the mentee or mentor departs the organization before the program concludes and are not able to continue meeting. Hopefully, the departing partner will coordinate with the remaining partner and the program manager to allow for an appropriate transition. If that does not happen, the program manager should be prepared to quickly identify a new mentor if the remaining partner is the mentee. If the remaining partner is a mentor, the program manager should determine if it is appropriate to identify if any unmatched mentees could benefit from the mentor's strengths and knowledge with the time remaining in the program.

## Step 7: Schedule Activities to Support Mentors and Mentees

A formal mentoring program needs structured activities to support the mentors and mentees.

At a minimum, you should schedule the following activities:

- Open House
- Orientation Session
- Mid-Year Review
- Graduation Ceremony

### Open House

You will need a way to market and introduce the program to your members. One way to do that is to conduct an information session called an Open House. An Open House is a gathering of sorts to allow your members to learn more about your program. At your Open House, your program manager should be visible and accessible to talk about the program benefits. Having your senior level champion on hand as well lends additional credibility. You could conduct scheduled mini-briefings during your Open House if you desire, although they are probably not necessary. Plan your Open House to be held in a room large enough to allow people to walk around comfortably with stations set aside separately for prospective mentors and mentees. Provide information packets at the stations for your members to take with them to learn more about the benefits, policies, and procedures of your program.

### Orientation Session

Once you've recruited and matched your mentees and mentors, you should kickoff the program with an Orientation Session. During the Orientation Session, you should outline and clarify policies and procedures. Your senior level champion or organization leader should deliver a short speech about the mentoring program during the orientation as well.

### Mid-Year Review

At the half-way point, you should assemble your mentoring pairs to learn how they are progressing and ask them to share things they've learned and ways they've learned them. This is a great opportunity to also ask for and receive feedback on program policies and procedures to ensure your program remains effective.

### Graduation Ceremony

A graduation ceremony is a great way to formally mark the closure of the formal mentoring relationships. And it's another great opportunity to ask for and receive feedback on program policies and procedures. You should give every mentee and mentor a certificate celebrating the success of their relationship. And you should have the senior level champion or organization leader deliver a speech to mark the occasion.

## Step 7: Schedule Activities to Support Mentors and Mentees

You should also consider the following activities:

- Workshops
- Field Trips/Tours
- Guest Speakers

### Workshops

You can plan and conduct workshops on any topic you feel will help the mentees, mentors, and the program meet organizational goals. Here is a short listing of what your workshops can focus on:

- A particular topic central to your organization's goals
- Key competencies required by most of your mentees
- Team-building activities to enhance the relationships or develop rapport

### Field Trips/Tours

You could organize a field trip or tour of a facility as a team-building activity or as a learning event. Use your imagination. You know your organization and members best. Are there any facilities or firms that you could tour to help your organization and your mentoring program meet its goals?

### Guest Speakers

Like workshops, you could invite guest speakers to lecture your mentoring program pairs on any topic you feel will help them and your program meet organizational goals.

## Step 8: Create Program Documents and Resources

To properly manage your program, you must create at a minimum, the following documents:

- Applications (for mentees and mentors)
- Confidentiality Agreement
- Mentoring Agreement
- Mentee Action Plan
- Mentoring Log
- Evaluation Forms

### Applications

Mentees and mentors must apply to participate in the mentoring program. Sample applications for each are on pages 30-33.

### Confidentiality Agreement

The mentoring program must be a safe environment for mentees and mentors to freely share information about one another. To help build trust, they must be able to establish clear boundaries on how the shared information is to be treated. A sample agreement is on page 34.

### Mentoring Agreement

The mentoring agreement establishes how and when the mentee and mentor will meet. A sample agreement is on page 35.

### Mentee Action Plan

To determine activities to ensure mentoring goals are met, a mentee action plan is a must. The mentee will complete the plan with help from the mentor. A template is on page 36.

### Mentoring Log

The mentee and mentor should record their meetings and activities to show progress achieved. A template is on page 37.

### Evaluation Forms

At the mid-point of the program and at the end, you must ask the mentees and mentors to evaluate the program. Their input will help you make any necessary adjustments to ensure the program remains effective. Sample forms are on pages 38-45.



## Step 9: Develop a Communications Strategy

Your organization may already have effective communication methods in place. Assess them to determine how they can best help your mentoring program. Then determine how you will promote and advertise the program as well as provide information and updates to your members. Ask yourself whether communications in person, print, web, or email, or any combination of them is best for your organization. Finally, establish who in your organization needs to receive reports on the progress and success of your program, as well as how you will deliver those reports.

In short, your communications strategy should allow you to do the following:

- Promote and advertise your program
- Provide information and updates to your members
- Report on the progress/success of the program

The Open House discussed briefly on page 2 should factor into your communications strategy. More information on the Open House, specifically regarding recruiting efforts is on the next page.

## Step 10: Train and Educate the Mentor and Mentee Pool

Before training and educating the mentors and mentees, you must first recruit them. However, you should not use the term “recruit” in your communications strategy as it may offend or scare off potential candidates.

You can use the Open House as an effective way to attract mentors and mentees to your program. Another way to attract mentors and mentees is through organizational newsletter articles, broadcast email messages, and printed materials such as posters and brochures.

You should also use the Open House to educate the mentor and mentee pool on why it’s important to be a mentor and why it’s important to have a mentor.

### Online Training for Mentors and Mentees

Employees at the USPTO have unlimited access to two very good online mentoring training modules. The modules are accessible through the Commerce Learning Center at <https://doc.learn.com/pto>. Search for courses titled “Effective Mentoring” and “Achieving Success: The Help of a Mentor”. The course library is updated a few times each year and some course titles change as a result. Contact the Enterprise Training Division in the Office of Human Resources for assistance if you cannot find the courses.

### Conduct Mentor Information Sessions

To have an effective mentoring program, you need to have enough mentors to meet the needs of your mentees. One way to maintain a pool of mentors is to continuously recruit them. You should conduct several information sessions each year for prospective mentors.

Goals for the information sessions are to:

- Attract new mentors for the program
- Define what is expected of effective mentors so they may make an informed choice about applying
- Ensure that mentors understand the process and criteria for selection, matching, dealing with mismatches, mentor training, and serving as mentors
- Ensure that persons who should not be mentors choose to not apply for the position

During the information sessions, the program manager should cover the following:

- The first three goals for the meeting (from the above paragraph)
- Purpose and goals for the mentoring program
- Roles and responsibilities of effective mentors
- Benefits of being a mentor
- The mentor selection process and criteria
- The mentee-mentor matching process and criteria
- The program's process and time line for dealing with mismatches (do NOT skip this here)
- Required initial training and follow up training and meetings
- Mentor Application
- Explain any remaining "next steps" mentors might take, and who to contact with additional questions

An alternative activity that may be effective is to use a panel of experienced mentors (two or three should be sufficient) to discuss the mentoring process and answer questions along with the leader.

## Step 10: Train and Educate the Mentor and Mentee Pool

### Educating Mentees

You should use your Open House as well as printed and electronic articles to educate your mentees. You could host a separate information meeting for mentees only if you desire, but the Open House should be sufficient.

### Information Packets for Mentors and Mentees

You should provide information packets to mentors and mentees during the open house and then again during the orientation session.

**Mentor** packets should contain the following documents:

- Application form (pages 32-33)
- Mentor Benefits (page 46)
- Mentor Responsibilities (page 47)
- Ideas to Assist Your Mentee (page 48)
- Effective Questioning Tips (pages 49-50)
- Giving Feedback (page 51)
- Tips for Being a Good Listener (page 52)

**Mentee** packets should contain the following documents:

- Application form (pages 30-31)
- Mentee Benefits (page 53)
- Mentee Responsibilities (page 54)
- How to Receive Feedback (page 55)

The following documents can go in both packets or just the mentee packet and can be provided only at the orientation session if you prefer:

- Confidentiality Agreement (page 34)
- Mentoring Agreement (page 35)
- Mentee Action Plan (page 36)
- Mentoring Log (page 37)

## Step 11: Implement and Evaluate the Program

Once you've completed steps 1 through 10 and have established a timeline for your mentoring program, you are ready to implement it.

In order, you should:

- Solicit/receive/review/approve applications
- Create mentor/mentee pairings based on compatibility from application forms
- Conduct an orientation session
- Conduct planned activities
- Conduct a completion (graduation) ceremony
- Evaluate each step of the implementation

At the mid-year (or mid-point of a 6-month program), ask all mentees and mentors to complete the mid-point evaluation form found on pages 38-41. Take action as necessary on the evaluations.

At the conclusion of the completion (graduation) ceremony, conduct an overall program evaluation with the mentors and mentees. Use the final evaluation form found on pages 42-45. Take action as necessary prior to launching the next program.

Conduct a follow-up evaluation about three months after the completion (graduation) ceremony to measure the success of the program. You can use the final evaluation form, and you may need to modify some of the questions based on the goals of your program and your organization.

# Templates and Samples

In this section, you will find the materials your mentoring program will need such as

- Applications (for mentees and mentors) [pages 30-33]
- Confidentiality Agreement [page 34]
- Mentoring Agreement [page 35]
- Mentee Action Plan [page 36]
- Mentoring Log [page 37]
- Evaluation Forms [pages 38-45]
- Additional Documents for Mentors [pages 46-52]
  - Mentor Benefits [page 46]
  - Mentor Roles and Responsibilities [page 47]
  - Ideas to Assist Your Mentee [page 48]
  - Effective Questioning Tips [pages 49-50]
  - Giving Feedback [page 51]
  - Tips for Being a Good Listener [page 52]
- Additional Documents for Mentees [pages 53-55]
  - Mentee Benefits [page 53]
  - Mentee Roles and Responsibilities [page 54]
  - Receiving Feedback [page 55]

# Templates and Samples

## Mentee Application

### Mentee Application

Mentoring is a special partnership between two people based on commitment to the Mentoring process, common goals/expectations, of the partnership, mutual trust and respect.

Mentoring is both a “Get and Give” experience with the goal of providing a rich and rewarding experience for both partners. We ask you to share your information so the program manager can match you in a mentoring relationship. Both you and your recommended mentor will have the opportunity to agree to the pairing before you are assigned to work together.

**Please submit your application to [insert program manager name and contact info] no later than [insert time and date].**

Name/Title/Grade:

Work Unit:

Work Email Address:

Work Phone Number:

**Please respond to the information requested below.**

1. List the positions and grades you have held:

2. Why do you want to work with a mentor?

3. Describe your strongest competencies (i.e. knowledge, skills and abilities):

# Templates and Samples

## Mentee Application

4. Describe the competencies you would like to strengthen and/or leverage through working with a mentor:

5. What are your interests or hobbies outside of work?

6. Do you have someone in mind who you would like to suggest as your mentor? If yes, list his or her name (we suggest selecting someone two grade levels above your current grade/organization:

[The program manager will confirm your requested mentor as a suitable match, his or her availability and interest in participating in the mentoring program and OHR management approval of the pairing. However, please note that there are no guarantees you will be paired with this individual.]





# Templates and Samples

## Mentor Application

3. Describe what you consider to be your strongest general competencies (i.e. knowledge, skills and abilities):

4. Describe what you consider to be your strongest technical competencies:

5. What do you think a mentee can learn from you?

6. What are your interests or hobbies outside of work?

# Templates and Samples

## Confidentiality Agreement

### *Confidentiality Agreement*

***Trust must be a verb before it is a noun.*** You must trust and be trustworthy to be trusted. It is one of the most, if not the most, important factor in the partnership.

Mentoring pairs will share information about one another throughout the association. Partners must be very clear on the limits they want to place on the information shared. Establishing clear boundaries is a big step toward building trust.

Here are a couple of statements to start your agreement. You may accept these as they are, build upon them, or establish a complete new agreement. The important thing is that both partners concur with the confidentiality agreement.

*1. What we discuss will stay between the two of us. [use the space below to add to this]*

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*2. What we discuss will stay between the two of us, unless we give each other permission or ask that the information be shared with others. [use the space below to add to this]*

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*3. Add other additional conditions you both mutually agree to.*

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*Mentor signature*

*date*

*Mentee Signature*

*date*

# Templates and Samples

## Mentoring Agreement

Mentoring is both a "Get and Give" experience with the goal of providing a rich and rewarding experience for both partners. Both partners must be respectful of each others time and commitments. We have created the following form to assist you in developing a schedule for your meetings. Please print information & sign below. **Each partner is to keep a copy and one is to be turned in to the Program Manager.**

Mentor: \_\_\_\_\_

Mentee: \_\_\_\_\_

Meeting time: (i.e. 10am, 2:30pm, etc) \_\_\_\_\_

Preferred Meeting day: \_\_\_\_\_

Frequency of meetings: (i.e., once a week, every other week) \_\_\_\_\_

We will generally meet for: \_\_\_\_\_ minutes \_\_\_\_\_

The best way to contact \_\_\_\_\_, the Mentor is by: \_\_\_\_\_

Or: \_\_\_\_\_

The best way to contact \_\_\_\_\_, the Mentee is by: \_\_\_\_\_

Or: \_\_\_\_\_

If unforeseen events arise and meeting time/day must be changed we will give our mentoring partner at least a \_\_\_\_ hour notice if possible.

\_\_\_\_\_  
*Mentor signature*

\_\_\_\_\_  
*date*

\_\_\_\_\_  
*Mentee Signature*

\_\_\_\_\_  
*date*

# Templates and Samples

## Mentee Action Plan

### Mentee Action Plan

With your Mentor, set goals that are focused, realistic, and tied to your competency goals.

Effective goals should be **SMART**:

- **S**: Specific
- **M**: Measurable
- **A**: Achievable
- **R**: Results-oriented
- **T**: Time based

Focus on competencies important to your organization. Build on your strengths as well as your weaknesses. Look for opportunities to learn by doing as well as observing and listening.

Mentoring Goal #1: \_\_\_\_\_

Competency: what specific skill do I want to develop?	Learning Activity: what action will I take to develop this	Beginning date and ending date	My co-workers and supervisor will see the following...	I know I have achieved my goal when...





# Templates and Samples

## Mid-Point Evaluation Form For Mentors

**Mentoring Program  
Mid-Point Review  
Mentor Form**

**Mentor Name:** \_\_\_\_\_

**Mentee Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How has your overall experience with the Mentoring Program been so far?

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2. Do you feel the resources provided by the Mentoring Program Manager adequately to prepared you for your role as a Mentor?

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3. Have you and your mentee been able to build a comfortable working relationship?

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# Templates and Samples

## Mid-Point Evaluation Form For Mentors

4. Do you think reviewing your Mentee's Application was helpful in learning how you two could work together? Why or why not?

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5. Do you think the Mentoring Log and Action Plan were helpful in keeping your meetings on track? Why or why not?

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6. Please share additional comments here:

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# Templates and Samples

## Mid-Point Evaluation Form For Mentees

**Mentoring Program  
Mid-Point Review  
Mentee Form**

**Mentee Name:** \_\_\_\_\_

**Mentor Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How has your overall experience with the Mentoring Program been so far?

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2. Do you feel the resources provided by the Mentoring Program Manager adequately to prepared you for your role as a Mentee?

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3. Have you and your mentor been able to build a comfortable working relationship?

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# Templates and Samples

## Mid-Point Evaluation Form For Mentees

4. Are you able to learn from your Mentor's experience and background?

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5. Do you think reviewing your Individual Development Plan with your Mentor will help you achieve your goals? Why or why not?

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6. Please share additional comments here:

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# Templates and Samples

## Final Evaluation Form For Mentors

**Mentoring Program  
Final Review  
Mentor Form**

**Mentor Name:** \_\_\_\_\_

**Mentee Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. Briefly give an overall description of your experience with the Mentoring Program.

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2. Do you think this program helps your mentee develop the skills knowledge needed to take on larger roles and more challenges? Why or why not?

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3. Which part of the mentoring experience do you feel was the most useful in helping the mentee reach the stated goals? Was there an element that you felt was not useful?

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# Templates and Samples

## Final Evaluation Form For Mentors

4. Would you recommend this experience as a mentor to a colleague? Why or why not?

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5. Are you interested in serving as a mentor again? Why or why not?

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6. Please share additional comments here:

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# Templates and Samples

## Final Evaluation Form For Mentees

**Mentoring Program  
Final Review  
Mentee Form**

**Mentee Name:** \_\_\_\_\_

**Mentor Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How has your overall experience with the Mentoring Program been so far?

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2. Do you feel the resources provided by the Mentoring Program Manager adequately to prepared you for your role as a Mentee?

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3. Have you and your mentor been able to build a comfortable working relationship?

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# Templates and Samples

## Final Evaluation Form For Mentees

4. Are you able to learn from your Mentor's experience and background?

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5. Do you think reviewing your Individual Development Plan with your Mentor will help you achieve your goals? Why or why not?

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6. Please share additional comments here:

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# For Mentors

## Mentor Benefits

### *Mentor Benefits*

*Mentoring is a cost effective valuable tool for developing our most important asset, **our people**. A successful mentoring process depends on the partners sharing common goals and expectations, having a commitment to the mentoring practice, and giving and receiving trust and respect.*

*Both the mentor and the mentee **give and grow** in the mentoring process. You, the mentor, have the opportunity to review your accomplishments and challenges, as a reminder of lessons learned. In sharing your expertise you are leaving a legacy and guiding another's career path. This also gives you an opportunity to review and reenergize your personal career goals.*

*You, the Mentor will get many benefits from this experience. Here are just a few additional benefits you might consider:*

- Personal satisfaction in helping someone grow professionally
- Learning from the Mentee
- Building new Relationships
- Developing your skill as a “teacher”—helping someone clarify their career goals
- Developing your skill as a “guide” – helping someone navigate the waters of the organization
- Developing your skill as an “advisor” – helping someone find their strengths and weaknesses
- Receiving recognition
- Future pay-offs

*As you reflect on being a mentor, think about who you would like as a mentee and what you would like to impart to them. This is, after all, going to be a partnership.*

- Do you want someone who seems to be following your same career path?
- Do you want someone who has skills which you have strengths in?
- Do you want someone who has different or similar skills as you?
- Do you want someone who has interest in similar skills and knowledge as you, but does not possess those competencies now?
- Do you want someone who is motivated by upward mobility?

Use the above questions to help you respond to the questions on the Mentor Application.

# For Mentors

## Roles and Responsibilities

### *Mentor Roles and Responsibilities*

Development of your mentee depends on exploring career aspirations, strengths and weaknesses, collaborating on means to “get there,” implementing strategies, and evaluating along the way. You as the mentor provide the “light” for the mentee to follow. Sharing your wisdom and past experiences is what the mentee looks for from you.

Here are a few roles and responsibilities to help you in the process:

- Support the mentee’s development of professional and interpersonal competencies through strategic questioning, goal setting, and planning
- Create a supportive and trusting environment
- Agree to, and schedule uninterrupted time with your mentee
- Stay accessible, committed, and engaged during the length of the program
- Actively listen and question
- Give feedback to the mentee on his/her goals, situations, plans and ideas
- Encourage your mentee by giving them genuine positive reinforcement
- Serve as a positive role model
- Provide frank (and kind) corrective feedback if necessary
- Openly and honestly share “lessons learned” from your own experience
- Keep discussions on track
- Respect your mentee’s time and resources
- Participate in the scheduled events for the program:
- Seek assistance if questions arise that you cannot answer

# For Mentors

## Ideas to Assist Your Mentee

### *Ideas to Assist your Mentee*

**Shadowing Events:** “Take your mentee to work”- meetings- include them in any when possible, presentations, etc., Look for opportunities to include your partner in what you do. Your mentee will be able to observe you and how you demonstrate your strong competencies.

**Work Sharing:** Look for or design learning assignments, where your mentee can assist you with projects to better understand your contribution to the organization.

**Hands-On Training:** Find opportunities to share specific knowledge and introduce your protégé to new work within the organization.

**Introducing:** Look for opportunities to introduce your mentee to key players or to others to broaden their prospective on the Organization.

**Listen more than talk.** Review the Effective Questioning sheet for ideas on progressing and the Active Listening worksheet to find out what will work best with your mentee.



# For Mentors

## Effective Questioning Tips for Mentors

### *Effective Questioning*

As a Mentor, it can be very easy to want to just jump in and solve your Mentee's problems for him/her. However, your role is to help the Mentee think for him/herself, and to do so, this involves you asking thought-provoking questions. Help your partner self-discover. Questions should usually be open ended questions: Questions that can't be answered with a one word answer.

We want you to be a **Questioning Coach**. Using questions to help your protégé reflect on their experiences and learn from yours. Being a questioning coach gives you, the mentor, an opportunity to:

- Uncover additional facts and information about your mentee
- Confirm your protégé's goals, aspirations, and needs
- Explore strong feeling about situations
- Define problems and possible solutions
- Discover your mentee's commitment to their growth

#### **Exploratory questions – to assess the real issues and gain greater understanding:**

- What are the most interesting aspects of your job?
- Why did you pick this to concentrate on?
- What do you want to gain?
- What do you want to be known for?
- What do you understand the issue to be?
- What tells you that your assessment is correct? What are other people's perceptions of this issue?
- What assumptions are you making here?
- What other ideas do you have?
- How long has this been as issue?
- What did you learn from past experiences that you didn't expect to learn?
- What are the reasons behind an issue?
- Have you tried to resolve this issue before? Why or why not? If yes, what was the result?
- What choices do you have?
- What progress have you made?
- What other ideas do you have?
- How are you using the things/ideas we've spoken about?
- What results are you looking for?

# For Mentors

## Effective Questioning Tips for Mentors

### Empowering questions – to assist the Mentee to think for him/herself:

- What are the skills you want to develop?
- What strategies come to mind when looking at a situation?
- What do you see as possible solutions here?
- What outcomes are you after here? Are these outcomes reasonable given the circumstances?
- What resources are available to help you move forward?
- What key players do you need help from?
- What forces may help and/or hinder you?
- What other information do you need to arrive at a solution?
- What are the pros and cons of each solution?
- What is the first step you need to take to achieve your preferred outcome?
- What alternative strategies should you develop?
- How will you know you have mastered or successfully enhanced a competency?
- How will you apply your new skill?

Ask more questions to really understand the responses you've been given. Rephrase the answer to ensure you have heard the reply correctly.

Most importantly—***Ask more questions & give fewer answers. Remember, he who speaks the most, learns the most!***

# For Mentors

## Giving Feedback

### *Giving Feedback—Checklist for Mentors*

Think of feedback as a teaching/counseling opportunity. Exhibit positive or neutral body language.

Do use:

- Good Eye contact – no scary stares
- Interested/neutral facial expression
- Nodding of head to show understanding or agreement
- Calm tone of voice
- Even voice volume
- Sitting slightly forward
- Relaxed arm & hand placement

Do Not use:

- Reduced eye contact, scowling, or narrowing of eyes
- Tense or aggressive posture
- Rocking, pen bouncing, hand wringing, or your specific version of nervousness/defensiveness
- Hands on hips or tightly clenched
- Arms tightly crossed across chest
- A blank expression

Use “I” statements. Give examples from your experience.

Don't say, “but” or “however”.

Avoid statements that describe someone instead of their actions

Ensure feedback is specific.

Give the other person an opportunity to ask questions or share their viewpoint.

Listen – carefully not only to the words but to the feelings and body language of the speaker. Don't become defensive.

Don't interrupt when the other person is responding.

Allow time and privacy for feedback- avoid/minimize distractions, set aside a uninterrupted time for your feedback session.

Help your mentee plan for next steps. Ask questions such as:

- What is a step you can do to reach your desired outcome?
- What are some ways you can think of to resolve this challenge?
- What resources are available to you?
- What can I do to help you?

# For Mentors

## Tips for Being a Good Listener

### *Tips for Being a Good Listener*

Be an “active” listener. That means doing the following:

- Give the employee your undivided attention.
- Stay off your phone, off your computer, and avoid disruptions.
- Hear the person out. Avoid interrupting.
- Be aware of your non-verbal cues such as nodding, smiling, and maintaining eye contact.
- To ensure that you heard the person correctly,

#### *Paraphrase*

“As I understand . . .”

“So, you’re saying that . . .”

“Let me see if I got that . . .”

#### *Summarize*

“So, your three concerns are . . .”

“There seem to be a few issues . . .”

“So, our main goals this time are . . .”

# For Mentees

## Mentee Benefits

### *Mentee Benefits*

*Mentoring is a special partnership between two people based on commitment to the Mentoring process, common goals and expectations, focus, mutual trust and respect.*

*Both the mentor and the mentee **give and grow** in the mentoring process. You, the mentee, can learn valuable knowledge from the mentor's expertise and past mistakes. You can increase your competencies in specific areas. You can establish valuable connections with higher level employees.*

*You, the Mentee will get many benefits from this experience. Here are just a few additional benefits you might consider:*

- Having a caring ear to hear your triumphs as well as your frustrations
- Developing your skill as a "planner" - getting a sharper focus on what's needed to grow professionally
- Developing your skill as a "learner"- getting new ways to acquire new skills
- Developing your skill as a communicator" – improving your ability to express your expectations, goals, and concerns
- Learning what it is like to be in a higher level position
- Getting an advocate within the organization
- Receiving knowledge about the "ins and outs" of the organization
- Getting honest feedback

*As you reflect on being mentored, think about who you would like as a mentor and what you would like to receive from them. This is, after all, going to be a partnership.*

- Do you want someone who has gone on the same career path you would like to follow?
- Do you want someone who has modeled the competencies you would like to strengthen?
- Do you want someone who has skills you currently don't have but wish to acquire?
- Do you want someone who will be a good sounding board for your goals?

Use the above questions to help you respond to questions on the Mentee Application.

# For Mentees

## Mentee Responsibilities

### *Mentee Roles and Responsibilities*

Your development depends on exploring career aspirations, strengths and weaknesses, collaborating on means to “get there,” implementing strategies, and evaluating along the way. Your mentor will provide the “light” for you to follow. Learning from the wisdom and past experiences of your mentor will serve you well and produce great benefits. Here are a few roles and responsibilities to help you in the process:

- Commit to your development
- Assume responsibility for acquiring or improving skills and knowledge
- Discuss your IDP with your mentor
- Be open and honest on your goals, expectations, challenges and concerns
- Actively listen and question
- Build a supportive and trusting environment
- Seek advise, opinion, feedback, and direction from your mentor
- Be open to constructive criticism/feedback and ask for it
- Come to your meetings prepared with a clear idea of what topics or issues you want to address
- Respect your mentor’s time and resources
- Apply what you learn from your meetings back on the job
- Keep your supervisor informed of the process and your progress
- Give feedback to your mentor on what is working or not working in the mentoring relationship
- Participate in the scheduled events for the program

# For Mentees

## How to Receive Feedback

### *Receiving Feedback—Checklist for Mentees*

Think of feedback as a learning opportunity. Exhibit positive or neutral body language.

Do use:

- Good Eye contact – no scary stares
- Interested/neutral facial expression
- Nodding of head to show understanding or agreement
- Calm tone of voice
- Even voice volume
- Sitting slightly forward
- Relaxed arm & hand placement

Do Not use:

- Reduced eye contact, scowling, or narrowing of eyes
- Tense or aggressive posture
- Rocking, pen bouncing, hand wringing, or your specific version of nervousness/defensiveness
- Hands on hips or tightly clenched
- Arms tightly crossed across chest
- A blank expression

Don't interrupt when the other person is explaining

If you need more information ask for clarification or specific examples

Paraphrase and repeat back to make sure you understood what was said. Keep doing this until you are clear on the feedback. Say things like...

- What I understood you just told me was.....
- When I \_\_\_\_\_ you think I.....
- What I hear you say is if I \_\_\_\_\_ I will.....

Provide relevant background information and explanations– not excuses. In your last meeting with your mentor you may not have given enough background and there may have been a misunderstanding – elaborate if necessary.

Listen carefully and don't become defensive. Do not "think ahead" preparing a rebuttal to a comment, you may miss a very important piece of information.

Compare this feedback with others you've received

Discuss strategies and next steps. Provide possible solutions – you are the captain of your ship.

Seek follow-up to your feedback session and share your progress with your mentor.

# Notes

