



Templates and forms

Additional mentoring
program resources

Templates and samples

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

Mentee Application	3
Mentor Application	5
Confidentiality Agreement	7
Mentoring Agreement	8
Mentee Action Plan	9
Mentoring Log	10
Mentoring Program Mid-Point Review — Mentor Form	11
Mentoring Program Mid-Point Review — Mentee Form	13
Mentoring Program Final Review — Mentor Form	15
Mentoring Program Final Review — Mentee Form	17
Mentor benefits	19
Mentor roles and responsibilities	20
Ideas to assist your mentee	21
Effective questioning tips for mentors	22
Giving feedback — checklist for mentors	24
Tips for being a good listener	25
Mentee benefits	26
Mentee roles and responsibilities	27
Receiving feedback — checklist for mentees	28

Mentee Application

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

Mentoring is 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 phone number: _____

Work email address: _____

Please respond to the information requested below.

1. List the series of 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):

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 whom 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.

Mentor Application

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

Mentoring is 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 mentee 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: _____

Organization/division: _____

Work phone number: _____

Work email address: _____

of mentees you would like to mentor: _____

Please respond to the information requested below.

1. Why do you want to be a mentor?

2. List the series of positions and grades you have held:

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?

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 factors 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 completely 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]

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]

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

Mentor signature date

Mentee signature date

Mentoring Agreement

Mentoring is 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 other’s time and commitments. We have created the following form to assist you in developing a schedule for your meetings. Please print information and 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. 10 a.m., 2:30 p.m., 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 _____ hour(s) notice if possible.

Mentor signature

date

Mentee signature

date

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 ...

Mentoring Program Mid-Point Review — Mentor Form

Mentee name: _____ Mentor name: _____ Date: _____

1. How has your overall experience with the mentoring program been so far?

2. Do you feel the resources provided by the mentoring program manager adequately prepared you for your role as a mentor?

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

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

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

6. Please share additional comments here:

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?

2. Do you feel the resources provided by the mentoring program manager adequately prepared you for your role as a mentee?

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

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

5. Do you think reviewing your individual development plan with your mentor will help you achieve your goals? Why or why not?

6. Please share additional comments here:

Mentoring Program Final Review — Mentor Form

Mentee name: _____ Mentor name: _____ Date: _____

1. Briefly give an overall description of your experience with the mentoring program.

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

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?

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

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

6. Please share additional comments here:

Mentoring Program Final Review — Mentee Form

Mentee Name: _____ Mentor Name: _____ Date: _____

1. How has your overall experience with the mentoring program been so far?

2. Do you feel the resources provided by the mentoring program manager adequately prepared you for your role as a mentee?

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

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

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

6. Please share additional comments here:

Mentor benefits

Mentoring is a 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 re-energize 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 his or her 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 his or her strengths and weaknesses

As you reflect on being a mentor, think about who you would like as a mentee and what you would like to impart to him or her. 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 in which you have strengths?
- Do you want someone who has different or similar skills compared to you?
- Do you want someone who has interest in skills and knowledge similar to 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.

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 him or her 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.

Ideas to assist your mentee

- **Shadowing events:** “take your mentee to work.” Include him or her in any meetings when possible. 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 in which 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 mentee to new work within the organization.
- **Introducing:** look for opportunities to introduce your mentee to key players or to others to broaden his or her perspective on the organization.
- **Listen more than talk:** review the effective questioning tips (page 22) for ideas on progressing and the active listening tips (page 25) to find out what will work best with your mentee.

Effective questioning tips for mentors

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 that cannot be answered with a one-word answer.

We want you to be a questioning coach. Use questions to help your mentee reflect on his or her 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 mentee's goals, aspirations, and needs
- Explore strong feelings about situations
- Define problems and possible solutions
- Discover your mentee's commitment to his or her 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 an 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?

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 and give fewer answers.** Remember, he who speaks the most, learns the most!

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 and 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 his or her actions. Ensure feedback is specific.

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

Listen carefully not only to the words but also 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 an 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?

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 and 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 ...”

Mentee benefits

Mentoring is a special partnership between two people based on commitment to the mentoring process, common goals and expectations, focus, and 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 more senior and experienced 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” — finding 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
- Having an advocate within the organization
- Receiving knowledge about the “ins and outs” of the organization
- Receiving 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 him or her. 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.

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 Individual Development Plan 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 advice, 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 when 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.

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 and 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 other feedback 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.