

Mentoring Program – Mentor Welcome Packet

Welcome to the Mentoring Program!

We would like to warmly welcome your participation in the PMI Madison Mentoring Program. The Mentoring Program has been established to provide its members with networking opportunities that may lead to mentoring partnerships. The goals of the Mentoring Program are to promote the discussion of project management concerns, organize various networking forums to build upon our common knowledge, and support individual development via professional partnerships.

Enclosed are several items to help you start your collaboration successfully and grow as project manager leader. This guideline is being provided by the Chapter to promote a common understanding among those members that participate in the Mentoring Program. This is a guideline, not a policy or procedure. Mentor and Mentee should agree at the start of a mentoring partnership which parts of this guideline that they will follow.

Please consider reviewing the guidelines periodically throughout the mentoring partnership. It is strongly recommended that the feedback forms be sent to the Mentoring Program Manager periodically throughout the mentoring partnership. Your feedback will be used to improve the PMI Madison Mentoring Program.

If you have any questions at any time, please contact the Mentorship Director at Dir-Mentorship@pmi-madison.org.

DISCLAIMER

PMI Madison provides no guarantees regarding the Mentee's career growth prospects. The Chapter sincerely hopes that the Mentee's careers prospects will be enhanced by this network, but those outcomes are the responsibility of the Mentees and not of the Mentor and PMI Madison.

Mentor/Mentee agrees to indemnify, defend, and hold PMI Madison, PMI, all elected officers and volunteers harmless against any loss, damage, expense, or cost, including reasonable attorneys' fees, arising out of any claim, demand, or suit asserting any losses or damages pursuant to participation in the PMI Madison Mentoring Program including but not limited to claims involving the infringement of any copyright, patent, trade secret, trademark, or proprietary right existing under the laws of the United States, any state or territory thereof, or any other country.

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Getting started

It is the responsibility of the Mentee to initiate contact with the Mentor.

This ensures the commitment of the one asking for your support and their buy-in to participate. Once contact has been established it is probably a good idea for you to meet face-to-face. This establishes rapport, creates a framework of understanding, and builds a friendly connection.

Where should you meet?

We suggest you find a public location which allows you to have conversation without creating a feeling of being rushed or an expensive commitment. Wherever the two of you agree to meet is fine!

How long should you meet?

We suggest this meeting be casual and friendly. You could benefit from some idea of what you would like to know about the other person, their goals, and background. Having that intent in mind should give you the ability to schedule an appropriate amount of time.

What should be discussed?

Developing an open and friendly relationship is critical to the success of this type of collaboration. Providing an appropriate amount of your background, history, and experience will encourage your teammate to also open up. Allow them to convey their personal information as they wish; be assuring of the confidentiality of this collaboration and business information exchanged. Inquire about their goals for the collaboration and professional growth as this becomes the roadmap for the change you will develop together. You may also find benefit in discussing the type of mentoring or coaching you will engage in.

How should you proceed?

Having exchanged contact information; then be sure to establish an understanding on how each can contact the other and when. Jointly establish how you will continue the collaboration, when you will meet, how you will communicate (email, phone, meetings), and how long the meetings will last. You may find there are times when one or both of you will need some preparation for the next meeting and sometimes you may be best served by a conversation.

This is the journey of the Mentee; it is their role to work to grow. Your most effective technique to help them grow maybe to ask questions and challenge them.

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MENTOR SUGGESTIONS

Dealing with your Mentee:

- The person who you are mentoring will be given your contact information. It is up to them to initiate contact.
- Try to meet in person if this is feasible at least once early in the relationship.
- You will be asked for regular reports on how you think the process could be improved.
- If business or other pressures make it impossible to continue, advise the Mentoring Program Manager who will find a replacement for you.
- Remember:
 - You are there to help but it is not your journey. Do not be offended if your advice is not always followed.
 - Keep the relationship light and friendly. Do not add to the pressures that the person you are mentoring may already be under.
 - Provide advice and guidance only within your area of expertise. If you aren't sure, refer the question to the Mentoring Program Manager.
 - You are part of a team. If you are in doubt about anything, contact the Mentoring Program Manager for assistance.
 - Keep all discussions confidential.
 - Discourage the giving of information that could be construed as company confidential.
 - Do not attempt to use your association to further your own business interests. ○ Declare any conflict of interest before it becomes an issue.
 - Proceed at a pace dictated by the person you are mentoring.
 - If you feel that the relationship is not working, for whatever reason, ask to have another mentor appointed.
 - Be prompt at returning calls or answering memos from the person you are mentoring.
 - Always treat any contact with a stranger with care until you feel comfortable with the relationship. As in any situation, do not give out personnel details beyond those that are necessary to the task in hand.

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1.1 . Types of Mentoring

1.1.1. Natural or Informal Mentoring

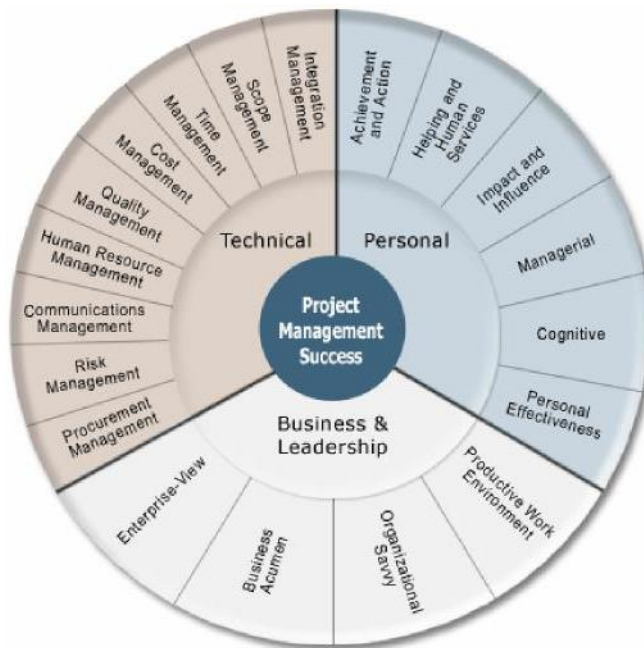
A less structured casual coaching & counseling relationship, which occurs with little or no, advanced planning.

1.1.2. Formal or Planned Mentoring

- Structured program in which individuals learn from each other
- Expectations & limits can be stated or agreed-to formally

1.1.3. Specialty Mentoring

Specialty mentoring utilizes mentors who specialize in one or more areas of project management. SMM (Subject Matter Mentor) coaches Mentee to improve their performance in areas in which they have special interest or experience for a short period to achieve a defined competency. Process is intended to be of a coach & council manner.



<http://www.butrain.com/mdp/CompModel.asp>

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1 .2. Mentor Benefits

Who is a Mentor? A Mentor is a trusted friend, counselor, or teacher. Although the primary function of the Mentor is to facilitate the Mentee's project success and professional Project Management growth through the development and execution of the Coaching Plan, Mentors/Mentee relationship offer growth, and development to the Mentor as well.

When mentoring is approached with a willingness to learn and share knowledge, all parties benefit. Mentors have the following opportunities:

- Increase their mentoring skills which they can use in numerous personal and professional areas.
- Learn new technical knowledge and skills.
- Indirectly "pay back" their personal mentors for help received.
- Increase their professional network by developing new professional contacts.
- Pass on years of experience.
- Demonstrate their ability to develop capable individuals.
- Gain tremendous satisfaction from contributing to the development of project managers
- Gain fresh enthusiasm for their careers.
- Gain exposure to new ideas, technologies, and perspectives through interaction with mentees.
- Achieve enhanced reputation as skilled Project Manager.
- Broadened perspective.
- Enhanced challenges and interests.
- Increased competency and confidence.

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2. MENTOR GUIDELINES

2.1. What Mentoring Is?

- An enabling process for skill development
- A confidence building exercise through experience sharing
- Focuses on discussing career goals
- Focuses on direction setting
- An open, trusted learning environment

2.2. What Mentoring is not?

- A Job training or specific job shadowing
- Mentoring is not therapy. It should not be devoted to solving personal problems
- Mentoring is not an endless time consuming activity. it should have a limited purpose
- Spoon feeding, training or teaching
- Does not provide a guarantee for job
- Does not offer placement services
- Is not a forum to vent out your emotions against your employer
- Is not a PMP exam preparation shortcut

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2.3. DO's

Schedule. Discuss the probable length of your formal Mentor / Mentee partnership.

Meeting Logistics. Decide when and where you will meet.

Expectations. Explore roles you picture for each of you. For example, do you want to be more of a sounding board than a teacher? Many mentors act the role of a "learning broker", helping their mentees find the information and other help they need. Or do you favor a coaching role for you? Expect your mentee to work towards achieving his/her (not your) goals.

Confidentiality. The best mentoring relationships maintain confidentiality between mentors and mentees. Ideas, feelings and plans stay between two of them. Talk about confidentiality, including what is and what is not acceptable to share with others.

Feedback. Come to agreement on how you'd like to give and receive positive and corrective feedback from each other. Always ask if you can make a suggestion or offer constructive criticism.

Any Limits or Preferences. Discuss your learning and communication styles so you can work well together. For example, can you contact each other between your scheduled meetings? Do you prefer an e-mail or voice mail? Be explicit about your own needs and limits (e.g. time constraints etc.)

Relationship. Keep the relationship on a professional basis. Help your mentee take the initiative in your relationship. Be open to the mentee's ideas, discuss topics etc. Proceed at a pace dictated by Mentee. Provide advice and guidance only within your areas of expertise. If you feel that relationship is not working, for whatever reason, ask a mentoring coordinator to have another mentor appointed.

Conflict of Interest. Declare any conflict of interest before it becomes an Issue.

2.4. DO NOT's

Do not...

- Assume, particularly if he/she is more junior, that your schedule always has top priority.
- Automatically give advice or criticism.
- Assume your advice will be followed.
- Take your mentee for granted or assume he/she doesn't need reinforcement.
- Talk negatively about your mentee behind his/her back.
- Make your mentee have to guess or learn by trial and error.
- Force your solutions in conflicts.
- Insist on waiting for the mentee to suggest every activity and do all the leading.
- Hang onto your mentee indefinitely.
- End the relationship on bad terms.

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Mentor Tip Sheet

LISTENING

- Actively listen to your Mentee and seek to understand what your Mentee needs from you.

GIVING ADVICE

- You are there to help but it is not your journey. Do not be offended if your advice is not always followed.
- Keep the partnership light and friendly. Do not add to the pressures that the person you are mentoring may already be under.
- Provide advice and guidance only within your area of expertise. If you aren't sure, refer the question to the Mentoring Program Manager.
- Try to back up your advice with where you learned it from; books, life experience, seminar, a former Mentor, etc. This helps guide your Mentee on ways to learn new skills.
- The Mentee needs encouragement. Remind the Mentee that being mentored means embracing change.
- Be prompt at returning calls or answering memos from the person you are mentoring.
- Proceed at a pace dictated by the person you are mentoring.
- Always treat any contact with a stranger with care until you feel comfortable with the partnership. As in any situation, do not give out personnel details beyond those that are necessary to the task in hand.
- Celebrate success!

ETHICS

- Keep a strong focus on ethics-based advice, decisions, and interaction with others.
- Keep all discussions confidential.
- Discourage the giving of information that could be construed as company confidential.
- Do not attempt to use your association to further your own business interests.
- Declare any conflict of interest before it becomes an issue.

DISRUPTING THE PARTNERSHIP

- If you feel that the partnership is not working, for whatever reason, ask to have another Mentor appointed.
- You are part of a team. If you are in doubt about anything, contact the Mentoring Program Manager who will either help or put you in touch with someone who can.

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AGREEMENT FORM

This mentoring network is sponsored by the PMI Madison / South Central Wisconsin Chapter) and designed to enhance the professional experience and development of the participants. Participation is strictly voluntary and without financial compensation. Please read the following guidelines regarding participation in the mentoring program. Your signature at the bottom of this agreement signifies your acceptance of the terms and conditions that govern participation in the network.

1. The duration of a topical mentoring session(s) could be for a short period of one or a few days of calls or meetings. A more formal and longer-term mentoring relationship between participants in the network could be from a few weeks or months to several months. Mentor and Mentee agree to actively participate in the network for the full duration of their engagement. Both will complete/return Periodic Feedback Forms to the Mentoring Program Manager.
2. Mentor and Mentee agree to be available, responsive to each other's needs and willing to adjust schedules as necessary in order to achieve the minimum number of contact hours described below.
3. As part of the PMI Madison Mentoring Program, Mentor and Mentee agree to establish "live contact" for a minimum of 2 (two) contact hours each month. Four (4) contact hours each month is advised. It is recommended that the minimum contact hours be spread across and composed of (at least) two separate and distinct sessions each month. Live contact, as it is defined for this network includes (and may not be limited to): face-to-face meetings, telephone conversations, video conferences, voice-only conference calls, email, Voice-over-Internet conversations, online chats, video, or live messaging via the Internet.
4. Participants are responsible for completing the program's paperwork to establish a "mentoring partnership" prior to the initial contact with their "partner" (Mentor or Mentee).
5. Information shared between the participants within the context of the formal mentoring partnership is considered confidential and should not be shared outside the relationship without expressed permission from the other participant(s).
6. An individual pairing of Mentor and Mentee may prove to be unworkable or unsatisfactory to either/both participants. At any point during the "mentoring partnership", either participant (or both) may request to dissolve the "mentoring partnership" and request a different "partner". The Mentoring Program Manager will address and resolve the pairing as quickly as possible, with no fault assigned to either party.
7. A Mentor's role is limited to the furnishing of opinions, guidance, advice and suggestions. Mentees should take all information given by a Mentor under advisement in making personal, professional and career decisions.
9. It is the responsibility of the Mentor to ensure that all opinions, guidance, advice and suggestions provided as part of the formal mentoring partnership, are accurate to the best of their knowledge

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and do not recommend or suggest course(s) of actions for the Mentee that could be construed as illegal, unethical, or immoral.

10. Participants accept responsibility for any costs incurred as part of the formal relationship, including, but not limited to: postage, telephone calls, travel, meals, conference/seminar registration, etc.
11. Individuals are permitted to take part in the PMI Madison Mentoring Program upon acknowledgment and acceptance of these terms and conditions as indicated by their signature below.
12. Participant is a current member of the PMI Madison (with dues current).
13. Please note that Mentors are volunteers and are not experts or paid consultants. Mentors, PMI Madison and the Project Management Institute are not responsible for business, career, personal or other decisions made as a result of the mentoring partnership. Mentors give only advice and/or information from their experience, perspective, etc. Mentors do not make decisions for Mentees. PMI®, PMI Madison and Mentors do not accept any responsibility for decisions made by Mentees.
14. By entering into the Mentoring Program, the participants agree that neither PMI, PMI Madison, nor other participants are liable for the guidance, suggestions and/or advice provided to them during the formal relationship.
15. Mentor/Mentee agrees to indemnify, defend, and hold PMI Madison, PMI, all elected officers and volunteers harmless against any loss, damage, expense, or cost, including reasonable attorneys' fees, arising out of any claim, demand, or suit asserting any losses or damages pursuant to participation in the PMI Madison Mentoring Program including but not limited to claims involving the infringement any copyright, patent, trade secret, trademark, or proprietary right existing under the laws of the United States, any state or territory thereof, or any other country.

Participant Name (Please Print)

Participant Signature
