



MENTORSHIP PROGRAM HANDBOOK



7/2018

Table of Contents

Program Overview	3
What is a Mentor?	3
What is a Mentee?	3
What does it take to be a Mentor or Mentee?	4
Mentorship Program Guidelines	5
The Mentorship partnership is NOT	5
Participation Process	6
Participation Timeline	6
Optional Partnership Activities	6
Keep in Mind	7
Mentorship Program and Earning PDUs	7
Appendix – Mentorship Agreement	8

Program Overview

The Mentorship program focuses on developing and enhancing project management competencies. It is designed to enhance the professional experience and development of the participants through experience sharing. Participation is voluntary and without financial compensation. The main objective is to match experienced Project Managers with individuals who are new to the Project Management field or individuals interested in furthering their knowledge in Project Management. Throughout the mentoring process, successful individuals help others to establish goals and develop the skills to reach their goals.

Mentoring can help you acquire skills, increase confidence, widen your perspective, learn from other's mistakes, avoid errors, enhance your career, enhance your personal life and help you succeed.

What is a Mentor?

A mentor is a professional project manager with over four years of experience, who voluntarily provides friendly manner advice to less experienced project management practitioners. Mentors are facilitators and catalysts in a process of discovery and insight. In a learning partnership, the mentor's role is to "guide on the side" rather than "be the expert with the answers". Mentor must be a PMI-SD Chapter member.

What is a Mentee?

A Mentee is a newcomer to project management profession or someone with a limited experience who is looking to obtain advice from a seasoned PMI certified professional. Instead of being mentor driven, with the mentor taking full responsibility for the Mentee's learning, the Mentee learns to share responsibility for the learning, setting priorities, and resources. Mentee must be a PMI-SD Chapter member.

What does it take to be a Mentor or Mentee?

MENTOR & MENTEE OVERVIEW	
PREREQUISITES	
Mentor	Mentee
<ul style="list-style-type: none"> Registered PMI-SD Member Minimum four years' project management experience Have a PMI certification designation Complete submission and acceptance of Mentor Application by published due date Commit to a Mentorship Agreement once selected for the program 	<ul style="list-style-type: none"> Registered PMI-SD Member Desire to achieve/maintain PMI Certification Motivated and desire to share and receive knowledge, experience, concepts, ideas, and time Complete submission and acceptance of application by published due date Commit to a Mentorship Agreement once selected for the program
RESPONSIBILITIES	
Mentor	Mentee
<ul style="list-style-type: none"> Motivated desire to listen and share knowledge, experience, concepts, ideas, and time Assist Mentee with setting developmental goals Co-create a Mentee development plan based on goals Share PMI/PMBOK insight Expand Mentee's knowledge Act as a coach Provide developmental feedback at mid-session checkup 	<ul style="list-style-type: none"> Devote time to expand your knowledge Willing to learn Co-create a Mentee development plan Able to accept feedback Willing to do more than normal routine Ability to identify and achieve goals Provide and receive developmental feedback at mid-session checkup
REWARDS	
Mentor	Mentee
<ul style="list-style-type: none"> Pass on successes to Mentee Practice interpersonal & management skills Expanded perspectives Recognition by Chapter Opening up additional ways of thinking Gain as much value as the Mentee does Engage and mold the next generation of Project Managers Satisfaction of contributing to the success of others Perpetuation of the project management culture 	<ul style="list-style-type: none"> Gaining valuable insight Understandings of strengths and opportunities for improvement Gaining different perspectives Confidence to lead and champion your project Improved PM skills Confidence to set and achieve performance goals

Mentorship Program Guidelines

- The pairing will be initiated by a pairing session and will be approved and finalized by PMI SD Chapter Mentorship Program Committee
- Prior to the pairing session, accepted Mentors/Mentees will receive a summary anonymous profile of all the participants (e.g., years of experience, PMI certifications, industry).
- The Mentor and Mentee should spend an average of 2 hours per month with each other. This can be face-to-face, over the phone or real time video/web communication methods. Additional mentor time may be required to follow up on suggestions or information provided by the Mentee.
- The Mentor/Mentee relationship length will depend on agreement with each Mentor/Mentee pair. It is recommended the mentorship should last at least 6 months.
- Should a pairing be deemed to be unworkable or unsatisfactory, Mentor or Mentee can raise their concerns to the Mentorship Program Committee. This committee will conduct a reassessment as quickly as possible without fault to either partnership member. In case of participation termination, if the committee approves, Mentor or Mentee can request to be added to the waiting list for the next mentorship pairing session.
- A Mentor or Mentee may opt out of the program once begun by contacting a member of the Mentorship Program Committee. The Committee Member will determine the next best steps based on results of a dialogue with both the Mentor and the Mentee. There is no guarantee that a new pairing will be formed. “No Fault” policy is enforced in this program should either the Mentor or the Mentee desire to opt out of the program. However, the Committee will work with the participant to retain him/her in the program.
- There are expectations of the Mentor-Mentee relationship as such:
 - Recognize and respect each other’s strengths and differences
 - Clarify personal expectations and roles
 - Establish clear goals and a mentoring action plan – by setting goals and objectives early on; a review can be done to assess if expectations were met
 - Manage the ‘logistics’ of the mentoring process to ensure meetings take place; partners should schedule meetings for mutually agreed times and venues

The Mentorship partnership is NOT

- Academic tutoring/teaching
- A way to get a job reference or job referral
- To qualify earn hours towards a PMI credential

Participation Process

1. Mentor/Mentee Application
2. Mentor and Mentee acceptance into the program by the program committee
3. Pairing workshop where Mentors/Mentees form partnership pairs
4. Mentor/Mentee partnerships in place recommended 6 months
5. Mentors and Mentees have the option to attend bi-monthly/quarterly meetings to share their mentorship experiences and lessons learned.
6. Mentor and Mentees document deliverables and lessons learned after they end of their mentorship
7. Mentor and Mentees submit completed Mentorship activity forms to mentorshp@pmi-sd.org.

Recommended Participation Timeline

The major program activities for participation by each Mentor and Mentee include:

- Month Prior to Mentorship Start Month: Pairing Workshop for Mentors/Mentees
- Month 1: Start of Mentorship Sessions
- Month 3 or Month 4: Report to PMI-SD status of mentorship and provide a log of the Mentorship Activities by submitting the Mentorship Activity Form to mentorship@pmi-sd.org. Attend at least one of the Mentorship group meetings to share mentorship experiences and lessons learned.
- Month 6: Complete all Mentor/Mentee Sessions
- End of Month 6 or Start of Month 7: Provide assessment to PMI-SD on the mentorship experience to mentorship@pmi-sd.org.
- Mentorship pairs can continue beyond 6 months. PMI-SD requests pair notifies the chapter if the mentorship does continue and when it ends.

Optional Partnership Activities

- Discuss the background and career path of both participants, including the work and aspirations within the project management field
- Conduct a personal assessment test (e.g. the Gallup Strength Poll) to determine the Mentee's strengths and those areas that require special attention
- Provide beneficial feedback on a project being undertaken
- Conduct a workplace site visit
- Create flow charts, process maps etc.
- Encourage article commentaries, books to read and book exchanges
- Participate in various webinars offered by PMI

Keep in Mind

- Interactions between Mentor and Mentee are to be professional and confidential
- Conversations should focus on projects, project management, and other professional topics
- Conversations should be respectful and honest without being brutal or discouraging

Mentorship Program and Earning PDUs

PMI SD Chapter members who have a registered PMI credential (PMP, PMI-ACP...etc.) can earn PDUs. PDUs are self-reported and are in the “Giving Back, Share Knowledge” category for mentors and are in the “Education, Informal Learning” category for mentees. The PMI-SD mentorship program requests mentorship pairs keep and retain a Mentorship Activity form to provide a record of the hours spent during the mentorship. If PDUs are self-reported to PMI, mentors/mentees should send a completed activity form to the PMI-SD mentorship program at mentorship@pmi-sd.org.

Appendix – Mentorship Agreement

The Mentorship Program is sponsored and designed to enhance the professional development of the participants. Participation is strictly voluntary and without financial compensation. Please read the Disclaimer, Confidentiality, and Code of Conduct sections below. Signature signifies agreement that govern participation in the program.

Disclaimer

Mentors are volunteers - not experts or paid consultants. Mentors, PMI, the PMI San Diego Chapter are not responsible for business, career, personal or other decisions made as a result of the mentoring relationship. Mentors give only insight from their experience, perspective, etc. Mentors do not make decisions for mentees. By entering into the Mentorship program, participants agree neither the PMI, PMI San Diego Chapter, or other participants have any responsibilities liability for suggestions and or advice provided during the mentorship relationship.

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

Confidentiality

Information (excluding contact information) provided by the mentor and mentee in applications to the PMI SD Chapter may be shared to those mentorship participants selected to participate in the program. The chapter will exchange the mentor's and mentee's name only after both parties have expressed interest in establishing the mentoring relationship. Information disclosed by mentors and mentees in the applications, in surveys, and any discussions will be reviewed only by the chapter mentorship program committee and appropriate chapter members. The individual results of surveys submitted to the chapter will be kept anonymous.

Code of Conduct

As the Mentor, to the following Code of Conduct, I agree to and I will (read and check boxes):

- ☐ Treat the Mentee with respect and sensitivity, while maintaining professional conduct.
- ☐ Keep any disclosure confidential unless the Mentee grants permission.
- ☐ Focus on providing knowledge and insight into the Project Management profession.
- ☐ Not assume the role of counsellor, regardless of issues brought to the table
- ☐ Support the Mentee in achieving their goals.
- ☐ Communicate with my Mentee at agreed upon times.

As the Mentee, to the following Code of Conduct, I agree to and I will (read and check boxes):

- ☐ Treat the Mentor with respect and sensitivity.
- ☐ Not ask or expect the Mentor to provide me with a job.
- ☐ Enhance my Project Management knowledge through the mentorship relationship.
- ☐ Keep any disclosure confidential unless the Mentor grants permission.
- ☐ Maintain professional conduct without expectation of friendship.
- ☐ Take the mentoring relationship seriously by meeting all commitments.
- ☐ Commit to achieving my goals.
- ☐ Communicate with my Mentor at agreed upon times.

Applicant Name: _____ Date: _____ (mm/dd/yyyy)

Signature: _____