

# Guidelines for Mentors and Mentees



**Sacramento Valley Chapter, PMI**

<https://pmi-svc.org/>

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# □ Foreword

Dear Sacramento Valley Chapter PMI Member:

The goal of the Project Management Institute (PMI) Sacramento Valley Chapter (SVC) Mentor Program is to help PMI-SVC members to:

- Become accomplished, productive, and successful in project management, professional skills, professional relationships, and career growth
- Sustain their professional motivation, now and in the future

The leadership of PMI-SVC believes that it is the responsibility of seasoned PMI-SVC members to assist newer PMI-SVC in developing their skills and careers. An effective PMI-SVC Mentor Program can help PMI-SVC members pass on (mentors) and acquire (mentees) the professional skills and attitudes for personal, organizational, and career success. This program will promote the development of self-confidence and professional achievement, and ultimately enhance chapter stability and continuity.

Because mentor relationships are an excellent way to enhance professional growth, the Sacramento Valley Chapter of PMI strongly supports mentor activities. With this in mind, PMI-SVC Board of Directors, have instituted a new PMI-SVC Mentor Program and delegated a Sponsor for the program. We hope that this guide will be useful. It includes helpful information from a variety of successful mentor programs and other resources. We encourage you to use and share it as a resource.

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# □ Introduction

The PMI-SVC Mentor Program (MP) of Sacramento Valley Chapter of PMI represents a bridge between long term or seasoned members and newer members. Mentors gain personal satisfaction, feedback, and networking opportunities. Mentees obtain advice, feedback, and an expanded base of skills, knowledge, and networking opportunities. The mentor-mentee relationship is designed to foster maximum productivity and commitment to the chapter through encouraging strong collegial relationships, training, support and recognition of accomplishments.

The first section of this guidebook, The PMI-SVC Mentor Program, provides background information about the concept of mentor and the purpose of the PMI-SVC Mentor Program. Definitions of mentor and mentee are included, with their respective roles in the mentor-mentee relationship highlighted and explained.

Putting It All Together: How the Program Works contains the basic elements of the program, with checklists for developing and maintaining the mentor-mentee relationship.

The developers of the PMI-SVC Mentor Program hope that the resources in this guide will assist you in continuing the traditions of excellence for the PMI-SVC Chapter.

# □ THE PMI-SVC Mentor Program

“One thing I know; the only ones among you who will be really happy are those who will have sought and found how to serve.”

~ Albert Schweitzer

## **Background Information about Mentor**

Mentor has been defined as the process by which one person, usually of tenured project management experience, guides the development of an entry level individual, seen as the protégé or the mentee. Additionally, the role is intended to be dynamic and interactive, thereby making the success of the relationship dependent on constructing meaningful dialogues and designing tangible actions.

In professional societies, mentor programs for new PMI-SVC members provide the opportunity to share pertinent resources, assistance and support, collaboration and discussion. While mentors cannot guarantee the job satisfaction and happiness of new PMI-SVC mentees, they can offer support, encouragement, and useful information.

## **What is a Mentor?**

The literature is full of definitions of mentors from a variety of sources, including classical literature, military training, academia, business, and government. These definitions include the roles of advocate, coach, teacher, guide, role model, valued friend, door-opener, benevolent authority, available resource, cheerful critic, and career enthusiast.

At Sacramento Valley Chapter of PMI, seasoned members serve as mentors. Mentors provide support that contributes to the career development of a newer colleague. As senior persons in their fields, mentors are less preoccupied with their own careers and activities and have grown to focus their attention on fostering growth and development in other professionals.

## **What is a Mentee?**

A “mentee” is someone who is counseled, guided, and advised. Here at PMI SVC, our mentor program focuses on newer members with less experience in their field. Typical mentees are seeking to be certified or seeking employment. Other mentees may request a mentor to guide advancement for their professional careers.

### **Overview of the PMI-SVC Mentor Program**

The PMI SVC Mentor Program is based on the idea that mentees need both specific, project management and general career advice relevant to advancing as a project manager. Examples of project management advice include PMP and other certifications and providing career information that is specific to project management. General career advice includes helping the mentee to be successful in the public and private sector, giving the mentee a broad, overall perspective of the Project Management career.

The assignment of mentees to experienced mentors depends upon having a cadre of experienced mentors who volunteer for the program. There are many senior PMI-SVC members enrolled in the program, and more will be added yearly. The Mentor Program Sponsor and the SVC Board will help them identify and encourage potential mentors to participate in the mentor program.

### **Mentor and Career Development**

Long-term, seasoned PMI SVC members bring a wealth of expertise to the chapter, and they share responsibility for creating a chapter culture that develops newer members. This effort emphasizes our heritage, which stresses the need for consistent dialogue, an appreciation for living and working in and as a community and caring for the development of each individual.

# □ Putting It All Together: How the Program Works

A lot of people have gone further than they thought they could because someone else thought they could.

~ Unknown

## **Starting the program**

Mentors and mentees may choose to pair or may be paired by the committee. The Mentor Program Committee (MPC), accountable to the Sponsor, will encourage new and seasoned PMI-SVC members to actively participate in the program.

As part of the recruitment process, information about mentor-mentee pairs will be passed along to the MPC, so it can track the mentor/mentee pair and send them information. Contact information will be kept on file so they can be contacted by the MPC about general PMI-SVC development activities and about the mentor program.

## **Frequency of Contact**

The efficacy of mentor is a direct result of the amount of time the mentor/mentee work together. Specifically, 88% of those who work with mentors once a month report substantial improvement to their professional skills, compared with 36% of mentees who work with mentors quarterly. Thus, we have determined that monthly meetings of some fashion are required for this program.

A kickoff event and final event are required for the Mentor/Mentee in order to receive Professional Development Units (PDUs).

## **Activities for Mentor-Mentee Pairs**

Some suggested joint activities for mentors and mentees include:

- Review resume and provide feedback
- Discuss strategies (i.e. looking for resources and collaborations) for advancement
- Discuss certification strategies
- Review time management strategies
- Provide techniques for managing projects
- Identify additional mentors that would be helpful to them

### **Duration of Mentor- Mentee Commitment**

The Full Session of the Mentor-Mentee Commitment is 20 weeks .Programs have Kickoff and Final Events. However, mentors and mentees are free to extend their relationship indefinitely. Continuing with the same mentee can be considered a “career-long support system.”

### **Kickoff Event**

The Kickoff Event marks the beginning of the Session. Both mentees and mentors are required to attend the event. Mentors and mentees will be matched up and must complete the PMI-SVC Mentorship Program Agreement and Professional Development Plan (see Appendix A and B) and file it with the PMI-SVC Sponsor.

During the Kickoff Event, a myriad of topics is covered:

1. The overall plan and schedule for the Session.
2. Acceptance and signing of the Mentoring Agreement.
3. Distribution of the Guidelines to Mentors and Mentees.
4. Discussion of a Personal Development Plan.
5. Assignment of the Personal Development Plan to mentees.
6. The roles of the mentor, mentee and Sponsor during the Session.

Mentees and mentors must register for the event. Participants receive an email when they register.

The Kickoff Event is considered part of an educational course. Participants who attend both Session events (Kickoff and Final/Closing), and complete related deliverables, will receive course PDUs at the end of the Session.

### **Personal Development Plan (PDP)**

The Personal Development Plan (PDP) (Appendix B) is the means by which each mentee creates a project plan to accomplish his/her goal(s). This plan is agreed and signed at the beginning of the session, and the goals are set by the mentee according to the directions listed in the plan. The plan is reviewed by the Mentor and Mentee and submitted to the Sponsor.

### **Final/Closing Event**

The Final/Closing Event is held during the last week of the Session. Mentees, with the support of the mentors, each make a 3-minute presentation which is their final report with respect to the status of his/her PDP including whether the goal(s) have been met.

The Sponsor will award PDUs based on completion of required activities. The details of the PDUs assigned is described below.



### **Program Evaluation**

Both mentees and mentors are expected to participate in the final survey which is an evaluation of the program's effectiveness. We will assess factors such as frequency of contact and the status of mentor goals, as well as the mentee's integration with the PMI SVC community (i.e., employment as a project manager, service on committees, intention to continue membership at PMI SVC). The evaluation may also include dimensions such as:

- Quality of information shared
- Relative comfort level enjoyed by both
- Quality of the constructive relationship between mentor/ mentee
- Ongoing quality improvement
- Degree of rapport established
- Availability of mentor when needed

### **Professional Development Units (PDUs)**

If a mentor or mentee attends both Session Events (i.e. The Kickoff Event and Final/Closing Event) and completes the associated deliverables, he/she receives 10.5 PDUs which may be applied to the PMP recertification requirement. Course PDUs are validated to PMI by the Sponsor on behalf of the mentors and mentees.

Mentee PDUs should be submitted by the mentee as Informal Learning (Educational opportunities focused on structured discussions). Mentor PDUs should be submitted by the mentor under the broad category, Giving Back to the Profession (which may be applied to the PMP recertification requirement) and specifically Share Knowledge (Sharing your domain knowledge to help others learn and grow).

Note: <https://www.pmi.org/-/media/pmi/documents/public/pdf/certifications/ccr-certification-requirements-handbook.pdf> Continuing Certification Requirements

## □ Summary

“One’s mind, once stretched by a new idea,  
never regains its original dimensions.”

~ Oliver Wendell Holmes

Our PMI-SVC membership is our most valuable resource. PMI-SVC mentors represent the most tangible bridge to continuing the traditions of excellence. The mentor program for PMI-SVC was developed at the Sacramento Valley Chapter of PMI based on the recognition that it is difficult to advance without multiple sources of support.

To better retain and revitalize our chapter, Sacramento Valley Chapter of PMI initiated this mentor program. If the mentor program nurtures, recognizes, and rewards the growth of PMI-SVC members, it has accomplished its mission.



# Appendix A - PMI-SVC Mentorship Program Agreement

1. *Meeting frequency* (frequency, duration, and location of meetings): determined and agreed by mentor-mentee pair.
2. *Confidentiality: (Participants agree to share the information on their Mentor Program applications with other participants and with PMI-SVC members who are involved with the Mentor Program.)*  
Any sensitive issues that we discuss will be held in the strictest of confidence. Issues that are off limits for discussion include:
3. *Plan for evaluating relationship effectiveness* (e.g., review of mentorship meeting minutes, goals, and outcomes/accomplishments):
4. *Responsiveness*: Mentor/Mentee agree to be responsive and reply to messages within 48 hours
5. *Relationship termination clause*: In the event that either party finds the mentoring relationship unproductive and requests that it be terminated, we agree to honor that individual's decision without question or blame.
6. *Duration*: This mentorship relationship will continue as long as both parties feel comfortable with its productivity.

## **Commitments of mentors and mentees**

I have read the above and I will conduct my participation in this mentorship in accordance with the *PMI-SVC Mentorship Agreement* and principles and description provided above. By Submitting the application, I am agreeing to PMI-SVC Mentorship Program Agreement.