CalHR Mentorship Model

June 2022

CAL★HR
CALIFORNIA DEPARTMENT OF HUMAN RESOURCES

Table of Contents

Introduction

The California Department of Human Resources (CalHR) has created the Mentorship Model (Model) to provide guidance and tools to organizations interested in developing a mentorship program. Mentorship is an employee development strategy that benefits your organization by:

- Supporting succession planning through transferring various types of knowledge.
- Building bench strength.
- Developing a pipeline of future leaders.
- Encouraging a global perspective.
- Strengthening appreciation for diversity, equity and inclusion.
- Increasing employee engagement and productivity.
- Promoting a culture of growth and support.
- Fostering trust, respect and openness.

A strong mentoring relationship often occurs organically. However, there are numerous challenges that may get in the way of an employee's effort to establish a mentorship. A mentorship program encourages employees to create and foster professional relationships for long lasting support systems.

Key Terms

The following key terms are used in the Model:

Mentorship - Relationship with the goal of professional and personal development.

Informal Mentorship Program - Loosely structured program, with little to no participant selection criteria. Initiatives and development activities are open to all employees.

Formal Mentorship Program - Structured program with formal participant selection criteria and focused pre and post evaluation methods.

Mentor - Experienced individual willing to share knowledge, advice and insight. Mentors may be formally selected based on set criteria, or informally invited to fulfill a mentor role for the purposes of an activity, event or brief time period.

Mentee - Individual who agrees to be advised, trained, or counseled by a mentor. Mentees may be formally selected based on set criteria, or the term may loosely apply to a larger audience.

Program Overview

The Model consists of four phases containing detailed steps and tools for completing each phase. Your organization can apply the Model and associated tools to a formal or informal mentorship program at any organizational level, and tailor it to fit your organization's needs and target audience in Office-centered, Remote-centered and hybrid working environments. Regardless of the type of program your organization develops, ensure associated support documents and resources meets American with Disabilities Act standards and are accessible to all target audiences. The level of formality of the program helps determine which program components to develop and their degree of structure. Refer to phases one through four below and customize each to create a program that is as unique as your organization.

PHASE 1: ESTABLISH STRATEGIC DIRECTION
STEP 1: Develop framework
STEP 2: Gain executive and stakeholder support
STEP 3: Establish ownership
STEP 4: Develop program

PHASE 4: EVALUATE, CONCLUDE, MAINTAIN
STEP 1: Evaluate program
STEP 2: Conclude cohort
STEP 3: Maintain program momentum
STEP 4: Administer program improvements

PHASE 2: ESTABLISH PARTICIPANTS
STEP 1: Market the program
STEP 2: Select mentors and mentees
STEP 3: Conduct orientation

PHASE 3: IMPLEMENT
STEP 1: Establish developmental goals
STEP 2: Manage participant involvement
STEP 3: Conduct midterm assessment

Phase 1: Establish Strategic Direction

Step 1: Develop Framework

Conduct Needs Assessment

Before undertaking detailed development of your mentorship program, consider obtaining executive approval early on to ensure appropriate organizational alignment. Determine the executive vision for the program, available resources, outcome expectations, and level of desired executive engagement throughout program development, implementation and maintenance. Continued executive and stakeholder support will be greatly beneficial throughout the life of the program as further detailed on page 6, .

Your organization can collect a variety of data to assist in developing a tailored mentorship program. Based on what your organization has available, review your organization's strategic plan, mission, vision, values, measurable goals and objectives to align the mentorship program by considering how the program will support your organization's strategic direction. Reference additional documents such as your organization's workforce and succession plans, and any employee engagement results that can further strengthen the need for mentorship, and help establish strong buy-in. Be aware of requirements in labor agreements that concern employee participation in mentorship programs. Mentorship can help address deficiencies in many areas including, but not limited to, the following:

- Professional development
- Leadership development
- Succession planning
- Other related initiatives

Gather workforce and succession planning data (i.e., retention rates, promotion rates, job performance and/or competency evaluations) as well as employee feedback to establish benchmark measures, illustrate need, establish priorities, and determine what type of program to develop. For detailed information on how to analyze your workforce, refer to Phase 2 of the State of California Workforce Planning Model, located on the State of California Workforce Planning webpage. Consider asking the following questions:

- How would you benefit from a formal or informal mentorship program at your organization?
- Would you participate as a mentor and/or mentee and have the availability to do so?
- Are you interested in being a mentor?

- What specific knowledge, skills and abilities do you look for in a mentor and/or mentee?
- What kind of development activities would you like to see implemented in a mentorship program?
- Do you utilize other career development activities provided to employees? If so, how have you benefited from these activities?
- Do you believe your organization encourages a mentoring culture?
- Do you currently receive or provide mentoring? If so, what are the benefits of the mentoring relationship?
- Do you have access to mentors in this organization?
- What kind of time commitment would be appropriate for a formal or informal program?
- Are your mentors and mentees Office-centered, Remote-centered or hybrid?

The needs assessment assists in:

- Developing a business case to assist in executive buy-in.
- Developing program components tailored to your organization's needs.
- Establishing benchmark data to measure program outcomes.

Determine how many employees the program will support, which division and program areas the program will target, and the level of formality that best fits your organization. Consider the collective results of the needs assessment, organizational alignment opportunities, and executive input.

Align to Organizational Needs

Use the needs assessment results to develop basic program structure for presenting to executive team to gain buy-in and support.

Purpose and goals. Determine what the program will accomplish and how participants will measure success, as well as how the success of the program will be measured. Consider the interest of stakeholders. The program may fulfill several purposes such as:

- Increase employee retention.
- Increase employee satisfaction and engagement.
- Improve work performance.
- Transfer of various knowledge.
- Provide employees with personal and professional growth opportunity.
- Foster a supportive work culture.

Participants. Identify the intended mentors and mentees depending on the priority of your organization (e.g., all employees, specific occupations, new employees, specific

levels, etc.). This may involve catering to multiple groups/levels and geographical areas simultaneously. Consider starting with a smaller group if developing a pilot program, such as a single division or program area, in order to increase the rate of success. Ensure an objective and equitable selection process if the program is not open to all your organization's employees. Consider your organization's diversity, equity, and inclusion goals in establishing your selection process.

Participant roles and responsibilities. Establish mentor and mentee roles and responsibilities. For examples refer to Appendix A: Mentor Roles, Responsibilities and Benefits; and Appendix B: Mentee Roles, Responsibilities and Benefits.

Program type. Determine if your organization and/or target audience is best suited for a formal or informal mentorship program. View the level of formality of the program as a spectrum which may contain elements from either category:

Formal	**Informal**
Structured	Loosely structured
Oversight of relationships	Minimal to no relationship oversight
Clear and focused participant goals	May or may not have participant goals
Participant matching criteria	No matching criteria
Open to all or specific group(s)	May not have an established end date
Established end dates	

Consider the following:

- Are there rigorous time constraints on the intended participants that may affect their availability to participate in the program?
- Would a targeted and/or less structured pilot program help build interest and buy-in for a larger scale mentorship program?
- Would a formal or informal program best suit the culture of your organization, and fulfill the purpose and goals of the mentorship program?
- Do the resources exist to coordinate a highly structured formal program?
- What is best suited for the culture of your organization or target participants?

Benefits. Identify benefits for mentors, mentees, your organization as a whole, and other stakeholders. Benefits likely include those listed on page 1, in the Introduction section. For a list of potential mentor and mentee benefits refer to page 21, Appendix A: Mentor Roles, Responsibilities and Benefits; and page 23, Appendix B: Mentee Roles, Responsibilities and Benefits.

Step 2: Gain Executive and Stakeholder Support

Make a compelling business case before developing a comprehensive formal or informal mentorship program. Gain support from the executive team, division/program area managers, and additional stakeholders by completing the following goals:

- Present needs assessment results, benchmark data, and program goals, to communicate how the mentorship program will benefit your organization now and in the future.
- Gain support for resources for a dedicated person, team, time and/or budget to ensure program success.
- Gain a clear understanding of the executive team and division/program area manager's vision of a successful mentorship program to further align the program's goals.

Step 3: Establish Ownership

Mentorship can be pursued in circumstances with limited resources, and across diverse working environments, whether formal or informal. Although there may be one person responsible for owning and coordinating the effort, consider forming a dedicated team comprised of full- or part-time members, to help ensure:

- Collaboration across divisions/program areas.
- Timely development.
- Implementation success.
- Comprehensive evaluation.
- Continuous maintenance of the mentorship program and activities.
- Enterprise-wide focus.

Depending on internal staffing resources to establish a dedicated team, options include but are not limited to:

- A working project team to carry out the work of developing the program.
- A formal steering committee and/or governance to provide oversight and ensure continued program maintenance.

Governance can be established through utilizing current structure or creating a new one that may include:

- Strategic Governance/Executive Council
- Steering or Action Committee or team
- Project Management Office

The right team size and structure can set your organization up for establishing and maintaining a successful mentorship program.

The list below represents distinct bodies of work to consider, which can be accomplished by one or multiple contributors. Understanding the roles and responsibilities may help identify which division areas and/or levels of the organization can assist with the associated aspects of the effort.

Executive Sponsor

- Ownership of the program development process.
- Provide oversight and guidance.
- Allocate resources necessary for mentorship program success.
- Make decisions.
- Communicate progress internally and externally.
- Ensure alignment with organization's strategic plan.

Mentorship Program Owner(s)

- Build a business case and implement the goals and objectives of the program.
- Work with the budget and strategic direction of your organization.
- Maintain open communication and collaboration organization-wide.
- Recruit mentors and mentees, and track progress.
- Sustain relationships with mentors and mentees.
- Develop contingency plans and resolve program issues.

Human Resources

- Provide necessary workforce data.
- Partner with frontline supervisors and mentorship program owner(s) to identify training needs and help develop solutions.
- Offer input and expertise about human resource processes.

Training Officer

- Support additional training needs that may develop.

Division/Program Managers

- Identify desired changes and impacts for the division/program.
- Assist in developing program goals and performance measures.
- Prioritize resources to implement mentorship strategies.
- Support program goals through encouraging employee participation and/or actively participating as a mentor or mentee in the mentorship program.
- Provide program feedback.

Frontline Supervisors

- Develop mentorship program strategies.
- Implement action plans in own operational area.

- Support program goals through encouraging employee participation and/or actively participating as a mentor or mentee in the mentorship program.
- Provide program feedback.

Employees

- Self-assess knowledge base and areas needing development.
- Support program goals through encouraging peer participation and/or actively participating as a mentor or mentee in the mentorship program.
- Provide program feedback.

While these critical roles and responsibilities can be assumed by one contributor or a variety of entities such as project teams or steering committees, for the purpose of this Model the roles and responsibilities will be assumed under "owner(s)."

Step 4: Develop Program

Create a Project Plan

Developing the mentorship program is a targeted process with measurable outcomes. A project plan can help organize the critical elements of the program, and keep deliverables on track. Develop a project plan and goals that are Specific, Measurable, Achievable, Realistic, and Time-oriented (SMART[1]) to keep the owner(s) accountable. Identify measures of success and tools to capture and evaluate results.

Develop Program Components

Consider building out the mentorship program components in this section to improve success. The level of formality of the program helps determine which components to include, how to align them with the program's structure and goals, and how structured the components will be. Further detail of some components is provided in the phase in which the actionable item takes place.

Participant selection and matching method. Develop a method and criteria for selecting and matching mentors and mentees. An informal program will often involve little to no criteria in selecting and matching mentees, and continuously have open invitations to the target participants to be involved in development activities and events. Some selection methods may include:

- Minimum career levels, or indicating the mentor must be a certain number of levels higher than the mentee.

---

[1] MindTools, SMART Goals: How to Make Your Goals Achievable.
https://www.mindtools.com/pages/article/smart-goals.htm

- Number of years of professional experience. This may be specific to experience at your organization, experience in a certain field, experience at a certain level, or overall professional experience.
- Self-nomination process.

For additional guidance about selecting and matching participants refer to page 11, Phase 2, Step 2: Select Mentors and Mentees. For a sample application form refer to page 25, Appendix C: Mentor Application Form and page 27, Appendix D: Mentee Application Form.

Participant tracking method. Develop a systematic method to keep track of participants throughout the duration of the program. Informal programs may involve a loose flow of participants that changes on a continuous basis. At minimum, keep track of the number of participants involved in each activity, names of employees who have been invited to take on the mentorship role for a given activity, and names of employees who are participating as mentees for a given activity. This information may also be useful in tracking the success of your program.

> *Recommended for Formal Program*
> Formal programs often contain a more structured tracking system including all participants' names, contact information and who they are matched with. Keep track of when mentorships dissolve and if/when new mentorships form.

Events and activities. Determine the duration of the program and develop a schedule of events and activities that align with your organization's resources, strategic direction or goal(s), and work culture. Include informational sessions, orientations, development activities, and graduation/closing ceremony. Refer to the following sections for additional details regarding events and activities that can be applied to an Office-centered, Remote-centered and hybrid workforce:

- Page 10, Phase 2, Step 1: Market the Program
- Page 13, Phase 2, Step 3: Conduct Orientation
- Page 19, Phase 4, Step 2: Conclude Cohort
- Page 38, Appendix I: Development Activities

Midterm assessment method. Develop a method for assessing success during the program while there is enough time to implement productive changes. This is particularly crucial for formal programs where mentoring pairs need to be assessed for compatibility. Determine how frequently throughout the program these assessments will occur. For additional guidance refer to page 15, Phase 3, Step 3: Conduct Midterm Assessment.

Evaluation method. Develop a method for evaluating the program based on the program's purpose and goals. Use evaluation results to:

- Compare against benchmark data gathered during the needs assessment to see if the gaps identified are being addressed.
- Identify program improvements and strengths.
- Illustrate impact on staff and your organization.
- Build a case for additional resources to sustain a mentorship program or future workforce support programs.

For additional guidance refer to page 18, Phase 4, Step 1: Evaluate Program.

Program procedures, tools and resources. Create program, procedures, tools and resources that will support the program. Sample templates are included on pages 21-44, in Appendices A through I.

Phase 2: Establish Participants

Step 1: Market the Program

Advertise the program to the intended participants by creating engaging marketing material and utilizing a variety of modalities such as:

- Electronic communication: email, intranet, and other internal communication platforms.
- Printed material: postcards, posters and flyers.
- In-person and/or virtual presentations: all staff meetings, division meetings, executive meetings and manager supervisor meetings.

Involve executive leaders to help champion the program by expressing their support and encouraging employees to participate. Communicate the benefits of mentoring to every organizational level invited to participate. This will assist in communicating the value of the program to employees and increase participation.

Advertisements can include the following information:

- Purpose of the program.
- Target participants.
- Summarize benefits to mentors and mentees.
- Date of Informational Session(s).
- Optional: Include a note about any additional incentives for mentor and mentee participation, for example:
  - A letter of participation, or certificates, will be signed by the director and placed in employee's Official Personnel File.
  - A closing ceremony will be conducted to recognize participant involvement and share positive experiences.
  - Mentors and mentees will be honored at an all staff meeting.
  - Mentors and mentees will be recognized in your organization newsletter.

Communicate a participation goal to division and program area leaders. For example, encouraging a participation level of two to three mentors and three to ten mentees from each area.

Conduct Informational Session

Encourage participants to attend an informational session so they can make an informed decision to participate. Provide detailed information for how an employee can sign-up to participate in the program, the deadline to sign-up, and who employees may contact for further information.

Important - Anticipate creating guidance and/or training for mentors to help guide and support them in their role. During the informational session communicate that such guidance will be provided during mentor orientation or via other means.

The following sample outline contains potential topics for the informational session:

- Program Overview
    - Goal(s) of the mentorship program.
    - Success factors and desired outcomes.
    - Type of program.
    - Target participants.
    - Duration of the program.
    - Benefits to mentors, mentees, organization and other stakeholders.
- Process
    - Selection process.
    - Mentor matching process (if applicable).
    - Application forms and deadlines.
- Expectations
    - Time commitment.
    - Roles and responsibilities of mentors and mentees.
    - Potential mentoring and career development activities.
- Open questions and answers.
- Overview of orientation session. Including date(s)/time(s)/location(s).

Develop informational packets for each attendee that includes:

- Roles and responsibilities.
- Activity schedule.
- Orientation schedule.
- Mentorship program contact information.

Step 2: Select Mentors and Mentees

Use the selection method established by the program owner(s) to screen participant applications. As part of the application process, request information that will assist in selecting and matching mentors or deciding which initiatives to implement. The application may require an employee biography, summary of education and work experiences, developmental goals or other pertinent information. For sample application forms refer to page 25, Appendix C: Mentor Application Form and page 27, Appendix D: Mentee Application Form.

Select Mentors

Mentors greatly influence the success of the program. Mentors can self or peer nominate, or may be directed to participate if the role is considered part of their job. Ensure mentors possess the skills and qualities necessary for success in this role. It is critical to provide support along the way to active mentors, as well as to individuals who are interested in mentorship but may need additional guidance and development before formally assuming the role.

Mentor desirable characteristics can include:

- Strong interpersonal skills.
- Knowledge about the organization and their professional field.
- Technical competency.
- Strong leadership skills.
- Confidence.
- Resourcefulness.
- Ability to maintain confidentiality.
- Willingness to be supportive and patient.
- Ability to be a positive role model.

Also review page 21, Appendix A: Mentor Roles, Responsibilities and Benefits

Select Mentees

The mentee provides the direction for the mentor.

Mentee desirable characteristics can include:

- Open to feedback and coaching.
- Ability to maintain confidentiality (note: the mentor has the responsibility to breach confidentiality in cases that require mandatory reporting).
- Awareness of developmental goals.
- Ability to assess and maintain appropriate boundaries.
- Remain organized and honor time commitments.
- Support program improvements.

Also review page 23, Appendix B: Mentee Roles, Responsibilities and Benefits.

Match Mentors and Mentees

We recommend a structured matching process for formal mentorship programs. Informal programs may vary in the level of structured matching, or may not prescribe to any.

We recommend mentorship program owner(s) work closely with their Human Resources office to vet matches consistent with their department's personnel policies

(e.g., bias, harassment, nepotism, personnel conflicts, etc.). Ensure matching criteria is objective, and does not lend itself to favoritism or personal biases.

Matching Methods

Mentors and mentees can be matched based on factors best suiting your organization's and employees' needs. Consider resources, time and flexibility when determining the mentor to mentee ratio. The standard ratio of mentors to mentees is typically 1:1 to 1:5. The mentorship program may include multiple types of mentorship matches, including but not limited to the following:

Experiences and developmental goals. The mentee is matched with a mentor whose experiences aligns with and supports the mentee's developmental goals.

Classification level. The mentee is matched with a mentor based on their classification level. It may be helpful to set criteria to assist in determining appropriate classification level matches, such as indicating the mentor must be a certain number of levels higher than the mentee.

Desired classification. The mentee is matched with a mentor who represents a classification level that the mentee would like to promote into.

Reverse mentorships. A senior employee (in terms of age, experience or position) is matched with a junior employee (in terms of age, experience or position). Reverse mentoring aims to help senior employees learn from the knowledge of a junior employee. The key to success in reverse mentoring is the ability to create and maintain an attitude of openness to the experience and dissolve barriers of status, power and position.

Self-matched. Employees choose their own matches based on short meet and greet or mini-interview techniques, such as speed mentoring, or reading through mentor bios, then choosing their top three picks. For a detailed description of speed mentoring refer to page 38, Appendix I: Development Activities.

Personal Characteristics. The mentee and mentor are matched based on mutual preferences for the type of individual they would like to engage in a mentorship relationship with.

Peer Mentoring. The mentee is matched with a mentor within the same classification, division, and/or occupation. The purpose of peer mentoring is to support colleagues in their professional development and growth, to facilitate mutual learning and to build a sense of community. Peer mentoring is not hierarchical, prescriptive, judgmental or evaluative.

Situational Mentoring. This targeted approach occurs at a point in time when a mentee needs specific expertise and guidance. It is usually short term and addresses an immediate situation, but can transition to a more long-term connection.

Step 3: Conduct Orientation

Once participants have been confirmed, and matches have been established, conduct an orientation session for program participants with the following goals in mind:

- Introduce mentors to mentees.
- Reinforce mentor and mentee roles and responsibilities.
- Review a mentoring agreement, either pre-established by the department, or teach mentors and mentees how to develop one. For a sample template refer to page 29 Appendix E: Mentoring Agreement.
- Teach mentors and mentees how to:
    - o Establish mentorship goals.
    - o Determine if a mentorship is not a good fit. Refer to page 16, the Assess Mentorship Compatibility section for more tips on reconciling challenging matches.
    - o Opt out of the mentorship relationship with tact and respect.
    - o Establish closure or transition, including natural points of closure.
- Review program tools and resources available to participants.
- Provide direction to mentors and mentees regarding next steps, such as:
    - o Schedule the first mentorship meeting in the next two days.
    - o Utilize one program tool or resource in the next week.
    - o Share a relevant article in the next week to discuss at the first mentorship meeting.
- Provide program owner(s) contact information

Consider facilitating the following activities at the orientation session:

- Include breakout sessions providing information or activities specific to mentors and mentees.
- Provide guidance or formal training to mentors about fulfilling their role successfully.
- Present techniques to mentors and mentees and allow participants to practice their skills.
- Lead a group activity for mentors and mentees.
- Allow time for mentors and mentees to establish developmental goals.
- Complete a benchmark evaluation.

Provide mentors and mentees with all the tools and resources necessary to receive the most benefit from their experience. When conducting this session virtually ensure participants have all materials in advance for ease of reference.

Phase 3: Implement

Step 1: Establish Development Goals

The mentor and mentee can use their first meeting(s) to identify development goals. For informal programs, this can be done in a group setting such as during orientation.

Recommended for Formal program

The mentor and mentee can accomplish the following in the initial meeting(s):

- Identify developmental goals.
- Develop mentoring agreement.
- Establish meeting schedule.

To help facilitate the formal mentoring process refer to page 30, Appendix F: Mentor Facilitation Guide.

Step 2: Manage Participant Involvement

Participant Tracking

Begin tracking participants once participation and/or matches have been established and agreed on. For loosely structured programs with no formal mentorship matching, begin tracking participants at the first mentorship activity or event.

Encourage continuous participation

Do not expect participants to completely self-direct their participation. It is crucial for program owner(s) to continue encouraging engagement throughout the span of the program. Simple strategies can assist in maintaining participant involvement:

- Offer short trainings and workshops on a variety of mentoring related topics.
- Facilitate a variety of group activities (page 31, Appendix I: Development Activities).
- Share mentor and mentee testimonials.
- Distribute literature such as articles, and/or short videos related to mentoring, benefits of mentoring, mentoring tools and techniques, and success stories.

Step 3: Conduct Midterm Assessment

Conduct an assessment during the program based on the program goals established by the mentorship program owner(s). Periodic assessment will reveal whether the program is meeting the goals and if any adjustments need to be made to make the program more effective.

Assess Mentorship Compatibility

Assess mentor and mentee relationships and make necessary changes in the interest of the mentee. Conduct an assessment after enough time has passed to overcome initial new relationship hurdles, but before too much time has passed that changes are no longer effective—For example, we recommend one to three months for a year-long program.

Create contingency plans for addressing mentorship mismatches. Neither participant should feel poorly if a mentor mismatch occurs. The following tips on how to address mentor mismatches are based on the United States Patent and Trade Mark Office, *How to Build A Mentoring Program: Mentoring Toolkit[2]*.

- 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 it may become clear that a better match can be made and it is no one's fault.
- Explain that the program has a no-fault re-matching 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 not a good mentor for another match. It is assumed that all mentors are strong employees. What this 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's approach 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.

---

[2] United States Patent and Trade Mark Office, How To Build A Mentoring Program: Mentoring Toolkit: http://www.opm.gov/WIKI/uploads/docs/Wiki/OPM/training/Mentoring%20Toolkit%203-18-10.pdf

- If a mentoring pair can work through conflicts by valuing diversity, the richness of their different viewpoints, 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.

Phase 4: Evaluate, Conclude, Maintain

Step 1: Evaluate Program

Evaluate your organization's mentorship program based on evaluation method and measures of success established during the program development phase. We recommend the following methods for gathering data to evaluate the program (use the method, and adjust level of rigor, as appropriate to the formality level of the program):

- Utilize focus groups to gather and record employee feedback and surveys. Record critical feedback offered by employees during the needs assessment and participant debrief session.
- Keep track of participation rates in large mentorship groups or mentorship events and activities.
- Survey participants before and after the mentorship program to identify the impact of the program. For sample surveys refer to page 33, Appendix G: Mentor Evaluation and page 35, Appendix H: Mentee Evaluation.
- Administer the same survey to program participants and a randomly selected group of employees who did not participate in the mentorship program. Compare the survey results to measure the influence of program participation.
- Analyze business results such as cost savings, increased process efficiency, or innovation that occurred due to employee participation in the mentorship program. One example may be, reduced turnover cost due to increased retention.
- Analyze workforce data such as the following before and after the mentorship program:
  - Employee engagement
  - Employee retention
  - Absenteeism
  - Performance or competency evaluation
  - Promotion rates
- Assess the lasting impact of participation in the program. Three to six months after the program ends, gather feedback from the employees who participated in the program and their supervisors regarding the following types of changes:
  - Increased confidence in abilities.
  - Improved job-specific knowledge, skills and abilities.
  - Improved performance of division/program area.

Step 2: Conclude Cohort

Debrief Participants

The purpose of debriefing participants is to bring their experience full circle. Debriefing also offers the program owner(s) the opportunity to gain valuable feedback from participants. Include open discussions about the following:

- Benefits from the experience.
- Challenges of the experience.
- Lessons learned.
- Suggestions for improvements.
- Most enjoyable activities and strategies.
- Ending or transitioning the mentorship relationships into a maintainable source of guidance and support.

Closing Ceremony

Organize a closing ceremony to celebrate mentor and mentee participants' completion of the program. Consider inviting all organization employees to attend the ceremony in order to build support and encourage employees to participate in the next mentorship cohort. The closing ceremony aims to fill the following goals:

- Express appreciation for all participants.
- Highlight positive outcomes of the program.
- Give participants the opportunity to share success stories.
- Encourage participants to continue the mentorship relationships they developed during the program.

Invite the Executive Sponsor and other senior leaders to speak at the closing ceremony so they can express support for the program and congratulate participants. Awards can be presented to participants to honor them for their time and commitment (e.g., certificates, books).

Step 3: Maintain Program Momentum

Throughout the course of the program, share short-term wins, success stories and feedback from participants with executive leaders to reinforce the executive team's visions for a successful program and help support requests for additional resources. Share with the rest of your organization to maintain the momentum of the program. Ongoing recognition of mentors will help retain mentors and gain new ones. Continuous organization-wide communication about mentoring will keep the program alive and encourage new participants to join future cohorts.

Step 4: Administer Program Improvements

Utilize participant evaluations and employee feedback to develop new strategies and administer program improvements. Make any necessary changes before beginning the program with the next cohort of participants. Communicate program improvements organization-wide, and improvement rational and expected outcomes to the executive team and managers. Communicating improvements illustrates employee feedback is valued.

Appendix A: Mentor Roles, Responsibilities and Benefits

[*This document serves as an example of mentor roles, responsibilities and benefits, and is adjustable to align with your organization's specific program purpose and goals.*]

Roles and Responsibilities of the Mentor

Be a positive role model. Demonstrate the highest level of professionalism and interpersonal skills. Foster trust, respect and openness.

Guide without giving advice. Guide the mentee toward their goals through open discussion and a thought-provoking and creative process rather than giving advice. For discussion prompts refer to Appendix F: Mentor Facilitation Guide.

Do not demonstrate favoritism. Refrain from influencing decisions regarding promotions, special assignments, or changes in employment, based on your experience as a mentor. Advocate and provide reference in appropriate circumstances.

Be open to reciprocal learning. Make mentoring a mutually beneficial experience by recognizing that the mentee brings a wealth of unique knowledge and experiences.

Be engaged. Actively listen, question and offer productive feedback. Identify underlying messages and take the time to fully understand what the mentee is communicating before formulating responses.

Be supportive. Fully support the mentee's professional development and provide encouragement and guidance.

Be patient. Demonstrate patience throughout the mentee's self-discovery process as the mentee may require significant assistance while exploring career directions.

Honor commitments. Honor the time and goal commitments of the mentorship program and those you develop with the mentee. If either or you are unable to maintain your respective commitments to the mentorship relationship, consider discontinuing the relationship so the mentee has a chance to be paired with a new mentor.

Maintain confidentiality. Respect the mentorship relationship by keeping private any personal or sensitive topics the mentee shares with you, while being mindful of maintaining your reporting responsibility in cases of bullying, harassment, discrimination, or other reportable situations.

Support continuous program improvement. Evaluate the mentorship program and your experience as a mentor as candidly and honestly as possible. Share ideas for improving the mentorship program with the program owner(s).

Benefits of Being a Mentor

Mentorship programs can generate a variety of benefits for your organization, the mentor and the mentee. Being a mentor may allow you to:

- Renew enthusiasm for the role of being a leader.
- Obtain a greater understanding of barriers experienced at other levels, or areas, of your organization.
- Enhance skills in coaching, counseling, listening, and modeling.
- Develop and practice a more personal style of leadership.
- Demonstrate expertise and share knowledge.
- Increase generational awareness.

Appendix B: Mentee Roles, Responsibilities, and Benefits

[*This document serves as an example of mentee roles, responsibilities and benefits, and is adjustable to align with your organization's specific program purpose and goals.*]

Roles and Responsibilities of the Mentee

Be active. Take full advantage of the mentoring experience by being active and engaged in the experience. Avoid being a passive listener by asking questions and sharing your own experiences and knowledge with your mentor.

Be Prepared. Optimize results of your mentor session by preparing for each session beforehand. Understand your goals for each session. Reflect on the following types of questions:

- What have I accomplished since our last session?
- What did I not get done, but intended to? What got in the way? What could I have done differently?
- What challenges and problems am I facing now?
- What opportunities are available to me right now?
- What support do I want from my mentor during this meeting?

Establish developmental goals. Assess your current situation and think about short and long term professional SMART goals. Your mentor may assist in helping you explore and define your goals.

Find the right fit. Whether mentors are self-selected or assigned, reflect on what characteristics and knowledge are personally important to you in a mentorship. Gain deeper insight into the compatibility of the mentorship through asking additional probing questions to your mentor, such as:

- What can you, as a mentor, bring to a mentoring relationship?
- What positions have you held in the past?
- Which organizations or organizations within government or private sector have you worked for?
- What parts of your education have contributed to your career choices?
- How much time do you anticipate being able to commit to this mentorship?

If a mentorship is not a comfortable fit, address your concerns with the mentorship program owner(s).

Be open to feedback and coaching. Expect continuous feedback and coaching related to your professional growth and goals from your mentor. The opportunity to receive confidential one-on-one guidance, feedback, and coaching can improve performance and support the achievement of professional goals. Use regular feedback to help transfer newly acquired knowledge and skills to the workplace.

Assess your own boundaries. Remember mentors are not expected to have definitive answers or be available 24/7. Try to imagine yourself in your mentor's place before making additional requests or changes. Assess your own boundaries and avoiding unhealthy dependencies.

Honor commitments. Honor the time and goal commitments of the mentorship program and those you develop with your mentor. If you or your mentor are unable to maintain your commitments to the mentorship relationship, consider discontinuing the relationship and/or request to be paired with a new mentor.

Maintain confidentiality. Respect the mentorship relationship by keeping private any personal or sensitive topics that may arise in your conversations with your mentor. Be aware of appropriate boundaries and express any concerns to the mentorship program owner(s).

Support continuous program improvement. Evaluate the mentorship program and your experience as a mentee as honestly as possible. Share ideas for improving the mentorship program with the program owner(s).

Benefits of Being a Mentee

Mentorship programs can generate a variety of benefits for your organization, the mentor and the mentee. Being a mentee may allow you to:

- Make a smoother transition into the workforce.
- Further professional development.
- Gain the capacity to translate values and strategies into productive actions.
- Complement ongoing formal study and/or training and development activities.
- Gain career development opportunities.
- Develop new and/or different perspectives.
- Demonstrate strengths and explore potential.
- Increase career networks and gain exposure.

Appendix C: Mentor Application Form

[*This document serves as a sample application form and should be adjusted to align with your organization's specific program purpose and goals.*]

Division/Program: _____

Name: _____ Classification: _____

Work Email: _____ Work Phone: _____

Manager Name: _____ Work Phone or Email: _____

Number of mentees you would like to mentor: _____

_____ If you have identified one or more mentees, please list name(s) here (Note: Specifying a mentee does not guarantee that match):

Identify attributes, professional development goals, or other preferred characteristics of your ideal mentee:

Why do you want to be a mentor?

What are your goals for the mentorship relationship?

What do you feel are your professional strengths?

What advanced technical skills do you possess?

What do you feel a mentee can learn from you?

The mentorship program owner(s) will match you with a mentee(s) based on the information you have provided. A mentorship program representative will contact you by [INSERT DATE] with information about the mentee(s) and next steps in the mentorship program.

For any questions or concerns please contact [INSERT CONTACT NAME] at [INSERT CONTACT INFORMATION].

Thank you for your interest in becoming a mentor.

Appendix D: Mentee Application Form

[*This document serves as a sample application form and should be adjusted to align with your organization's specific program purpose and goals.*]

Division/Program: _____

Name: _____ Classification: _____

Work Email: _____ Work Phone: _____

Manager Name: _____ Work Phone or Email: _____

If you have identified a mentor, please indicate the mentor's name (Note: Specifying a mentor does not guarantee that match):

Identify attributes, professional development goals, or other preferred characteristics of your ideal mentor:

Why do you want to have a mentor?

What are your goals for the mentorship relationship?

What are your developmental goals?

The mentorship program owner(s) will match you with a mentor based on the information you have provided. A mentorship program representative will contact you by [INSERT DATE] with information about your mentor and next steps in the mentorship program.

For any questions or concerns please contact [INSERT CONTACT NAME] at [INSERT CONTACT INFORMATION].

Thank you for your interest in participating in the mentorship program.

Appendix E: Mentoring Agreement

[*This document serves as a sample mentoring agreement that can be completed by the mentor and mentee, or pre-determined by the mentorship program owner(s). The actual agreement should be adjusted to align with your organization's specific program, purpose and goals, and vetted by the organization's legal division.*]

This document serves as an agreement between [INSERT MENTOR'S NAME] and [INSERT MENTEE'S NAME] that appropriate mentoring will take place over the next [INSERT NUMBER OF MONTHS] months. Both parties agree to fulfill the roles of the mentor and mentee, and uphold to the following terms and conditions as set forth by [INSERT NAME(S) OF AGREEMENT AUTHOR(S)]. (Expand sections for additional space if necessary.)

Mentor Name: _____

Mentee Name: _____

The mentor and mentee identified in the Mentoring Agreement mutually agree to adhere to the following expectations:

> *Sample:*
>
> - *Adhere to the mentee and mentor roles and responsibilities as outlined by your organization.*
> - *Commit to one formal meeting per month, and one additional mentorship activity per month. If one party must cancel, it is the responsibility of the cancelling party to reschedule the meeting/activity.*

The mentor and mentee identified in the Mentoring Agreement mutually agree to adhere to the following confidentiality terms:

> *Sample: Respect the mentorship relationship by keeping private any personal or sensitive topics shared by mentor or mentee. Maintain reporting responsibility in cases of bullying, harassment, discrimination, or other reportable situations.*

The mentor and mentee identified in the Mentoring Agreement mutually agree to adhere to the following additional terms:

> *Sample: The mentor and mentee agree to contribute equal effort toward the mentorship relationship. If at any time there is dissatisfaction from either end, the mentor and mentee agree to open and respectful communication regarding additional needs, and/or seek guidance from the program owner(s).*

The mentor and mentee identified in the Mentoring Agreement understand that the Mentoring Agreement is entered into voluntary for the mutual benefit of the participants.

The Mentoring Agreement has no specified term and may be ended at any time by either the mentor or the mentee.

Mentor Signature: _____   Mentee Signature: _____

Date: _____   Date: _____

Appendix F: Mentor Facilitation Guide

[*This document serves as a sample facilitation guide for mentors and should be adjusted to align with your organization's specific program purpose and goals.*]

Initial Meetings

Within the first two meetings with the mentee, develop a mentoring agreement or sign a pre-developed agreement, communicate expectations, and establish developmental goals.

Develop A Mentoring Agreement

A mentoring agreement increases mutual accountability for you and the mentee. Utilize a standard agreement if one has been developed. Otherwise, determine the terms with together, which can include:

- Establish expectations. Discuss roles and responsibilities, frequency of meetings and communication styles and boundaries.
- Define confidentiality.
- Identify additional terms.
- Consult with program owner(s) on non-standard or modified agreements.
- Sign and date the agreement.

Establish Developmental Goals

Assist the mentee in developing short and long-term professional SMART goals by helping assess current situations, defining future career plans, and identifying actionable steps to fulfilling the goals. Developmental goals may include:

- Improving or developing certain competencies.
- Improving or developing personal characteristics.
- Increasing organizational awareness (e.g., navigating organizational culture to increase career success).
- Improving professional or personal development related to a specific career path or career change.
- Determining career goals.
- Guidance with accomplishing a critical step toward a career goal.

Record the mentee's developmental goals and keep them handy for mentorship sessions.

Establish Meeting Schedule

Develop a meeting schedule together that includes regular one-on-one meetings as well as other activities you plan to attend together. Meetings and activities may be conducted in-person, virtually or both, in adherence with your organization's safety guidelines and your organization's telework policy. Activities could include events organized by your organization. We recommend the mentee be responsible for scheduling meetings and activities in order to help develop organizational skills.

Refer to the list of developmental activities provided to you by your organization.

Discussion topics

Discussions between you and the mentee will often happen organically. Below are some suggestions based on the National Institute of Health's Office of Human Resources[3] to assist in encouraging conversation throughout any step of the process:

- Spend time learning more about each other and building a personal relationship before formally tackling mentorship program objectives.
- Share career stories. How did your careers start, what changes were made along the way, including high and low points? What experiences were helpful?
- Discuss the mentee's personal vision. How would the mentee envision personal progress in the next few years?
- Ask about topics not pertaining to work such as current events, family history, hobbies or entertainment.

Both mentees and mentors are expected to respect how much information each person wants to share.

Discuss the mentee's strengths and how to enhance growth. The mentee can find insight from personal observations, comments in performance reviews, informal feedback from supervisors or coworkers (by e-mail, for example), educational grade(s). What do people say the mentee does best?

- Feel free to add your own observations.
- Discuss the mentee's growth areas and tentative plans for working on them. Discuss how feedback will be given and received and anything the mentee would like to avoid doing.
- Have the mentee describe a perfect week including what the mentee does, where they live, and how people talk about them. Discuss these discoveries with the mentee and what can be learned/applied from them.
- Identify/refine one to three objectives to work on together -- preferably skills pertaining to growth areas and leveraging strengths.

---

[3] National Institute of Health's Office of Human Resources: https://hr.nih.gov/ https://hr.nih.gov/

- Consider choosing a book or article to read together, or that the mentee can read independently that is related to the mentee's developmental goals. Discuss the book together and brainstorm ways the mentee can apply the information.
- Discuss how generational differences may impact communication in the workplace. Share examples.
- Review and discuss mentee's resume or a written work assignment. Offer constructive criticism based on mentee's career goals.
- Discuss an inspirational quote and brainstorm ways the mentee can apply the quote. If comfortable to do so, discuss any cultural values that each of you hold onto. Has culture come into play at all in adjusting to the work setting?
- Discuss some of the "unwritten rules" each of you had observed or learned about success in your organization. How has this differed from other organizations? What other lessons have been learned?
- Communicate what you have appreciated about your mentoring relationship with one another and about the mentorship program.
- Have the mentee research a career path of interest within your organization. Provide feedback and act as a sounding board for the mentee.
- Discuss your learning styles and preferences.
- Mutually share how others (including competitors or critics) describe you and what you can learn from those perspectives.
- Discuss a role model that has been influential in each of your lives. How has the role model impacted your decisions or beliefs?
- Have the mentee research learning opportunities (training courses, books, on-the-job activities) and align discussion based on the mentee's developmental goals.
- Have the mentee identify risks, difficulties or stress they are facing in the next few months (e.g., deadlines, fears, successes or failures, other challenges.), and plan ways to minimize the impact of these stressors.
- Discuss balancing work and life.
- Discuss a situation of interpersonal conflict the mentee experienced and what was learned from the situation.
- Discuss a situation of miscommunication the mentee experienced and what was learned from the situation.

Appendix G: Mentor Evaluation

[*This document serves as a sample mentor evaluation to assess whether program goals were met, and should be adjusted to align with your organization's specific program purpose and goals.*]

1. Please select one response per row.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
The program met my expectations.					
The mentoring relationship fulfilled my expectations.					
My mentee match was suitable.					
I met with my mentee a sufficient amount of time.					
Mentoring has renewed my enthusiasm for the role of a leader.					
Mentoring has improved my confidence at work.					
Mentoring has helped me obtain a greater understanding of barriers experienced at various levels of your organization.					
Mentoring has helped me develop and appreciate new or different perspectives.					
Mentoring has helped me develop my coaching skills.					
Mentoring has helped me develop my listening skills.					

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Mentoring has helped me model desirable behaviors.					
Mentoring has helped me develop a more personal style of leadership.					
Mentoring has helped me feel more engaged with my work.					
Mentoring has helped me feel increased fulfillment in my career.					
I would recommend the mentorship program to other employees.					
I would like to participate in the mentorship program again.					

2. What was your vision for a successful mentorship program?

3. If obstacles impeded reaching mentorship goals, what were they?

4. What have you learned from the mentorship program?

5. Indicate if there is any part of the mentorship program you would like to see improved, and if so how.

6. Indicate whether you will continue the mentorship relationship now that the mentorship program is over, and why or why not?

Appendix H: Mentee Evaluation

[*This document serves as a sample mentee evaluation to assess whether program goals were met, and should be adjusted to align with your organization's specific program purpose and goals.*]

1. Please select one response per row.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
The program met my expectations.					
The mentoring relationship fulfilled my expectations.					
I met my developmental goals for the mentoring relationship.					
My mentor match was suitable.					
I met with my mentor a sufficient amount of time.					
My supervisor was supportive during the mentorship program.					
Mentorship has helped me improve my knowledge, skills and abilities at work.					
Improvements in my knowledge, skills, and abilities have improved my job performance.					
Mentorship has helped me feel more confident at work.					
Mentorship has helped me develop new or different perspectives.					
Mentorship has helped increase my professional networks.					

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Mentorship has helped me receive greater exposure at my organization.					
Mentorship helped me further my professional development.					
My mentor provided valuable feedback and guidance.					
Mentorship has helped me feel more engaged with my work.					
Mentorship has helped me feel increased fulfillment in my career.					
I will continue my mentorship relationship even after the mentorship program.					
I would recommend the mentorship program to other employees.					
I would like to participate in the mentorship program again.					

2. What was your vision for a successful mentorship experience?

3. What career and personal goals did you work on during the course of the mentorship program?

4. What specific actions did you take to work on these goals?

5. If obstacles prevented you from accomplishing your goals, what were they?

6. What did you learn from the mentorship program?

7. Is there any part of the mentorship program you would like to see improved, and if so, how?

8. On average, how many times a month did you meet with your mentor?

_____   per   _____

number   week/month

9. Indicate whether you will continue the mentorship relationship now that the mentorship program is over, and why or why not?

Appendix I: Development Activities

This list of development activities is a compilation of mentoring activities utilized by a variety of organizations. The list is divided into large group activities and individual or small group activities, with the majority being convertible to an Office-centered, Remote-centered and hybrid work environment. Large group activities require more involved planning and will likely be initiated by the mentorship program owner(s). Mentors and mentees can incorporate many of the individual or small group activities into their regular mentoring schedule. Choosing a variety of activities will help engage participants, maximize the mentorship experience, and offer interactions that suit a variety of preferences. Participants can debrief after these activities in a small group or one-on-one setting to further relate the value of the activity.

For each activity option the description includes: who should initiate the activity and a suggested Matching Criteria indicating the degree that mentors and mentees should be matched. For example, a high Matching Criteria indicates it is an activity best suited for programs where matches are strategically identified.

Large Group Activities

Program Open House

Initiator: Program Owner(s)

Select one of the scheduled program activities or events and invite employees who might be considering participating in the mentorship program. Invite prospective participants to observe, participate and ask questions of mentors, mentees, and facilitators.

Matching Criteria: None

Division Chief Brown Bag Lunch with Staff

Initiator: Program Owner(s), Mentor, Executive team member

Organize a brown bag lunch with the Division Chief and a small number of participants. Depending on the size of the division, this may be most appropriate for delegation to Assistant Division Chiefs.

In this casual setting, the Executive or Senior Leader are encouraged to:

- Share their story about the impact of mentoring (either as a mentor or mentee) in their own career or personal life.
- Ask participants to share their own mentoring experiences and stories
- Describe what elements/activities are part of informal mentoring, such as:

- o Making informal mentoring a regular part of one-on-ones.
- o Accompanying a manager or other employee to a meeting.
- o Reaching out to a manager or other employee in an area of personal or career interest.
- o Asking if participants have suggestions for additional elements/activities to enhance current efforts.
- o Sharing what other divisions/units are doing regarding informal mentoring.
- o Reminding participants that everyone can mentor.

Matching Criteria: None

Mentorship Training Activities

Initiator: Program Owner(s)

Provide short sessions offering tools and techniques to maintain effective mentoring relationships.

Matching Criteria: None

Literature/Video Distribution

Initiator: Program Owner(s)

Distribute literature such as articles, and/or short videos related to mentoring, benefits of mentoring, mentoring tools and techniques, and success stories.

Matching Criteria: None

Speed Mentoring

Initiator: Program Owner(s)

Arrange a setting in which mentees can receive information or guidance from multiple mentors in a time-controlled environment as both parties share knowledge and experiences during brief interactions.

Matching Criteria: None/Low

Guest Speaker

Initiator: Program Owner(s)

Invite a guest speaker to share success stories that motivate the mentoring relationship. Possible guest speakers include senior executives in state government, community leaders, retirees and other organization leaders.

Matching Criteria: None/Low

Networking Events	Initiator: Program Owner(s)

Provide free flowing networking opportunities between mentors and mentees, mentors only, or mentees only. Networking groups can also be broken out by occupational groups, leadership levels, etc.

Matching Criteria: None/Low

Group Mentoring	Initiator: Program Owner(s), Mentor, Mentee

Team one mentor with several mentees who meet at the same time. As the mentees pose questions, the mentor listens, reflects and engages all members of the group into the conversation. Mentees have their own experience and insight to share and can draw their own learning from the discussion.

Matching Criteria: Low/Medium

Monthly/ Quarterly All-Staff Meetings	Initiator: Program Owner(s), Mentor, Executive team leader, Manager/Supervisor

Mentors set aside 10 minutes on each monthly/quarterly agenda to share ideas and activities related to mentoring such as:

- Icebreaker Activities.
- Spotlight each unit's function within the division to enhance role clarity.
- Invite other divisions to come and informally share what they do.
- Share an overview of what mentoring is and how employees can informally apply it in their work.
- Share mentorship success stories.
- Invite the program owner(s) to explain the mentorship program.

Matching Criteria: None

Individual or Small Group Activities

Drop-in Mentoring	Initiator: Program Owner(s)

Establish a brief one-time meeting for an individual to learn and seek guidance from a more experienced person who can pass on relevant knowledge and experience. The only requirement is one hour or less of a mentor's time to meet with a mentee.

It is a low budget and simple option to recruit busy executives and other senior leaders to become mentors without investing a lot of time. After this meeting, the mentor and mentee can decide if they would like to continue the relationship.

Matching Criteria: None/Low

Open Office Hours
Initiator: Program Owner(s), Mentor, Executive team leaders, Manager/Supervisor

Schedule monthly or bi-monthly open office hours where employees can discuss career development opportunities, project work, and build a working connection with their manager/supervisor/executive team member.

- Block off an hour or two once a month or every other week and let your employees know that you are available in your office or another onsite location for an impromptu meeting.
- Send a meeting notice to your employees so the time appears on everyone's calendar and stay committed to the time.
- Tell employees you are available to talk about anything; this time is for them to use as they see fit.
- Encourage employees to come individually or in a group, whatever makes them feel more comfortable.
- Consider playing music, or bringing treats, and hanging a sign on your wall to let employees know that you're available.
- Be flexible on location—remember open office hours can happen anywhere (e.g., your work space, outside, walk and talk, break room, etc.).

Matching Criteria: Low

Team Mentoring
Initiator: Program Owner(s), Mentor, Mentee

Have more than one mentor working with one mentee or a group of mentees in the same setting. Team mentoring allows mentors to work together or separately to help the mentees reach identified developmental goals. Mentors communicate regularly to share information and ideas.

Matching Criteria: Medium

Meeting Mentoring
Initiator: Mentor, Mentee

Mentor attends part or all of a mentee's project or other working meeting, or invite mentee to accompany them to one of their meetings.

Mentor is encouraged to invite mentee to a monthly meeting (don't worry about titles, levels, units).

Matching Criteria: None – High

Informal Presentations at Employee Meetings

Initiator: Executive team leader, Mentor

Use 10 to 20 minutes of regularly scheduled unit meetings for informal knowledge sharing.

- Send an email to employees asking which division or area they would like to learn more about.
- If you do not get a response, create a list of divisions or areas employees may benefit learning from. Think about people you often come in contact with, focus on improving efficiencies and understanding processes.
- Email managers of the divisions you have listed to ask if they would be willing to do a brief presentation about their unit and what they do.
  - Give four or five dates to choose from and let them know they can send whoever they would like to present, it doesn't necessarily have to be the manager/supervisor.
- Before the presentation, get the point person's contact information so employees can follow up with questions.
- At the conclusion of the presentation, encourage employees to reach out to them with more questions or for more information.

Matching Criteria: None

Virtual Mentoring

Initiator: Program Owner(s), Mentor, Mentee

Use videoconferencing, the internet, and e-mail to develop mentorships instead of face-to-face mentoring. This is beneficial for those who are unable to leave their workplace and for those who live in rural or remote communities. Virtual mentoring is usually less expensive compared to face-to-face mentoring and provides an individual with more choices for mentors. Even with virtual mentoring, we recommend the mentor and mentee meet face-to-face at least once. Be mindful of limitations of virtual

communication (e.g., limited visual cues for interpersonal communication).

Matching Criteria: High

Lunchtime Session

Initiator: Program Owner(s), Mentor, Mentee

Utilize lunch hours or 15-minute breaks to meet with mentee for an informal mentoring session. Optional: include mentee's supervisor.

Matching Criteria: High

Mentor Switch

Initiator: Program Owner(s), Mentor, Mentee

Find another mentorship pair interested in switching mentees for one session. This allows mentees to explore other areas they may be interested in, establish another connection and consider the new mentor when they begin the program again.

Matching Criteria: High

Informal Networking

Initiator: Mentor, Mentee

Mentor introduces mentee to at least two people who could prove helpful to the mentee's career. Before introducing them, provide tips on issues to address or avoid.

Matching Criteria: High

Joint Committee

Initiator: Program Owner(s), Mentor, Mentee

Mentor and mentee serve on a committee together.

Matching Criteria: High

Highly Visible Work Project

Initiator: Mentor, Mentee, Manager/Supervisor

Present a new project to a mentee as a career development opportunity that might help them get noticed by a unit or division they are interested in exploring. Discuss and clear the proposed project with the mentee's supervisor. These projects support the employee's professional development as well as introduce them to new scopes of work within your organization.

Matching Criteria: High

Job Shadow

Initiator: Mentor, Mentee

Encourage mentors to invite their mentees to job shadow for a full day, part of a day, or during a critical event or interaction related to the mentees' goals and interests. Discuss and clear the proposed time with the mentees' supervisor.

Matching Criteria: High

Presentation Feedback

Initiator: Mentee

Invite mentor to a presentation or meeting the mentee is delivering or facilitating (with permission from mentee's supervisor) and ask the mentor to provide feedback regarding the mentee's presentation skills during the next mentoring session.

Matching Criteria: High

International Mentoring Day

Initiator: Program Owner(s), Mentor, Mentee

International Mentoring Day takes place each year on January 17. The purpose of International Mentoring Day is to foster global understanding and to support the mentoring movement worldwide. It also seeks to raise awareness of the global contributions of mentoring toward the United Nations Sustainable Development Goals. Learn more at **mentoring.org/news/press-releases/second-annual-international-mentoring-day-muhammad-alis-legacy/**

Matching Criteria: None

National Mentoring Month

Initiator: Program Owner(s), Mentor, Mentee

WASHINGTON, DC – National Mentoring Month launched in 2002. Since then, each January has served as an annual kickoff of the widespread movement to connect more of the nation's young people with caring adult mentors. Learn more at **mentoring.org/news/press-releases/president-obama-declares-january-2017-national-mentoring-month/**

The National Mentoring Month campaign toolkit provides guidance on the most impactful ways you can lend your voice to the mentoring movement!

Matching Criteria: None

References and Resources

The following resources were used in the development of the CalHR Mentorship Model:

California Department of Human Resources Statewide Competency Models. http://www.calhr.ca.gov/Training/Pages/competencies.aspx

California Public Employee's Retirement System. Informal Mentoring Toolkit for Executives and Senior Leaders. http://www.calhr.ca.gov/Documents/wfp-calpers-informal-mentoring-toolkit-for-executives-and-senior-leaders.pdf

California Public Employee's Retirement System. Informal Mentoring Toolkit for Managers and Supervisors. http://www.calhr.ca.gov/Documents/wfp-calpers-informal-mentoring-toolkit-for-managers-and-supervisors.pdf

Mainframe University. Mentoring Agreement

Office of Human Resources at the National Institute of Health, NIH, HHS Mentoring program http://trainingcenter.nih.gov/hhs_mentoring.html

Mentor http://www.mentoring.org/

MindTools, SMART Goals: How to Make Your Goals Achievable. https://www.mindtools.com/pages/article/smart-goals.htm

United States Office of Personnel Management, Training and Development Policy Wiki http://www.opm.gov/WIKI/training/Mentoring-and-Coaching.ashx

United States Office of Personnel Management, Best Practices: Mentoring. https://www.opm.gov/policy-data-oversight/training-and-development/career-development/bestpractices-mentoring.pdf

United States Patent and Trade Mark Office, How to Build A Mentoring Program: Mentoring Toolkit. http://www.opm.gov/WIKI/uploads/docs/Wiki/OPM/training/Mentoring%20Toolkit%203-18-10.pdf

Contact Us

California Department of Human Resources

Statewide Workforce Planning and Recruitment

1515 S Street, North Building, Suite 500

Sacramento, California 95811-7258

www.calhr.ca.gov

Statewide Workforce Planning

wfp@calhr.ca.gov

(916) 322-0742

Statewide Recruitment

state.recruit@calhr.ca.gov

(916) 324-9379

"The delicate balance of mentoring someone is not creating them in your own image, but giving them the opportunity to create themselves."

Steven Spielberg

Workforce Development Programs and Special Projects Division

California Department of Human Resources

1515 S St., Ste. 500

Sacramento, CA 925814