



# Pacific Learning Partnership for Environmental and Social Sustainability

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## E-Mentoring Handbook

*(Adapted from the 2018 World Bank Group's Mentoring Toolkit for Mentors and Mentees)*

August 2021

## THE WBG MENTORING TOOLKIT

This toolkit provides resources—guidance, tips, and tools to facilitate participation in the PLP-ESS E-mentoring relationships.

This toolkit contains:

- An overview of E-mentoring programme under the PLP-ESS
- Information about the mentoring process
- Responsibilities of mentors and mentees
- Tips for building successful mentoring relationships
- Tools to maximize your learning and development

We hope that you will find these materials useful in creating a productive mentoring experience.

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## 1. MENTORING AT THE PACIFIC LEARNING PARTNERSHIP FOR ENVIRONMENTAL AND SOCIAL SUSTAINABILITY

The adverse impacts of development on Pacific people and their environment is reason why the PLP-ESS and partners (*World Bank, Asian Development Bank, Secretariat of the Pacific Regional Environment Programme, and the University of the South Pacific*) are working together to build stronger national capacities of Pacific Island Countries' to implement effective EIA/Safeguard management to achieve their national sustainable development goals and priorities. Through the E-mentoring programme, young professionals and practitioners in the EIA/Safeguards management profession will receive one-on-one mentoring support for 6 months.

### What is Mentoring?

Mentoring is a developmental relationship between a mentor— someone with a specific skill set or subject matter expertise and a mentee—a less experienced individual who desires to acquire skills or knowledge in that area. Mentors and mentees should see themselves as partners for the benefit of mutual learning. Mentoring serves as a complement to other forms of development, and should not be viewed as a route to a promotion.

**IMPORTANT:** It is important to note that mentoring is NOT an opportunity to receive specialized training as well as seeking for technical assistance for the mentee to perform his/her work. The role of the mentor is to facilitate discussions towards solutions and offer career advice. In many cases, the mentor will help the mentee to broaden their knowledge about specific issues or topics that is of interest to the mentee while the mentee is expected to do the work as prescribed for each mentoring session. Mentor will add value to the mentee by bringing their experiences and knowledge to broaden the mentees understanding about the EIA/ESS profession and the work it entails, raise the level of understanding of the mentee about external networks and opportunities that the mentor is aware of and which could be useful to the mentee, and finally, the mentor will nurture conversations with the mentee about the importance of ethics and values that are critical for decision-making in their role as well an EIA/ESS professional in general.

### Benefits of Mentoring

The mentoring relationship is often cited as being one of the most meaningful developmental experiences in an individual's career— it is an opportunity that benefits the mentor, the mentee and the organization (inclusive of the PLP-ESS partnership).

Mentees have the opportunity to:	Mentors also benefit by being able to:
❖ Increase their knowledge and skills and build confidence in targeted areas	❖ Develop leadership skills such as coaching and giving feedback
❖ Gain perspectives and insights from more experienced leaders or technical experts	❖ Enhance ability to work with staff to address variety of development needs

❖ Build relationships outside their team	❖ Get exposure to diverse perspectives and approaches in Pacific Island development context
❖ Gain exposure and build networks within the PLP-ESS	❖ Gain access to new information channels and networks in mentee's organization/country
❖ Increase knowledge of different job functions and career paths	❖ Increase awareness of available talent in the mentee's organization/country
❖ Gain insights into organizational culture and structure of the PLP-ESS partners	❖ Gain better understanding of issues faced by more junior staff

**In addition** to helping individuals to enhance performance or develop in their careers, mentoring also provides numerous benefits for the PLP-ESS partnership as a whole by:

- ❖ Facilitating knowledge sharing within and across functions of individual PLP-ESS partners
- ❖ Building a more confident, effective leadership talent pool for the Pacific ESS Community of Practice
- ❖ Promoting legitimacy and career development of the EIA/Safeguard profession in Pacific Island Countries

### Programme Coordination

The E-mentoring programme coordinator will work with the partners to identify mentors and mentees and distribute relevant materials needed to achieve a successful mentoring outcome. The coordinator will collect all outputs (i.e. completed checklists and templates) during or at the closure of the programme. S/he will manage the overall programme (pairing, events, and evaluations) and can be a resource for issues that may arise during the mentoring programme.

### Matching mentors and mentee

Understanding what makes a successful mentoring relationship is fundamental in the matching process. Areas to consider are:

- ❖ age
- ❖ gender
- ❖ ethnicity
- ❖ matching skills and experience with areas of development (i.e. water and sanitation, ports, telecommunications, roads and bridges, hydro-dams, energy, mining, buildings, etc)
- ❖ life experience
- ❖ location
- ❖ working practices – i.e. part-time or flexible working
- ❖ personality
- ❖ interests

The mentoring programme coordinator of the PLP-ESS will work with the partners to identify suitable mentee and mentor during the early stages of planning. Selection criteria will be developed (in addition to the aforementioned bullet point listings) to guide the matching exercises.

### Code of Conduct

A written code of conduct for both the mentor and mentees will help to reduce instances of misunderstandings. A sample of the Code of Conduct is provided within the Mentoring Agreement.

## Meeting Structure

In order to ensure the mentoring process is productive, it is important to determine how best to use your time together. A meeting of 60-90 minutes should enable you to have a productive discussion and ensure you have an opportunity to discuss immediate concerns as well as progress toward your longer-term objectives. Work with your partner to determine what timing works best for your situation. One suggestion is to set up a recurring meeting through the length of the program. A recommended time allocation for a one-hour meeting is:

**First 10 Minutes:** General conversations and check-in

**Next 15 Minutes:** Discuss high priority issues or concerns

**Last 35 Minutes:** Focus on specific mentoring objectives, “homework”, action items etc

Additional guidance on how to conduct each sessions is provided below the ‘[Getting Started](#)’ section on page 12.



Photo 1: Kiribati Incountry Training on EIA

## E-mentoring Process

Some mentor/mentee connections maintain relationships long after the programme that matched them. However, for the purpose of the time they have together within the programme, it can be helpful to consider phases/steps of the relationship, activities that occur in each step, along with responsibilities and tools provided in this toolkit are listed below.

Steps	Key Activities	Mentee Responsibilities	Mentor Responsibilities	Tools/Outputs
<p><b>Step 1:</b> Establishing Connection</p>	<ul style="list-style-type: none"> <li>❖ Organize intro email, calendar invite &amp; send meeting link (i.e zoom, webex, ms teams); Convene first virtual call/meeting</li> <li>❖ Discuss expectations</li> <li>❖ Discuss meeting times etc</li> </ul>	<ul style="list-style-type: none"> <li>❖ Reflect on areas for professional growth</li> <li>❖ Begin to identify learning goals</li> <li>❖ Determine expectations and area of mentoring focus</li> <li>❖ Sign Mentoring Agreement</li> </ul>	<ul style="list-style-type: none"> <li>• Read guidance for mentors section in this handbook</li> <li>❖ Reflect on expectations</li> <li>❖ Consider your preferred times to meet</li> <li>❖ Organize calendar invites</li> </ul>	<ul style="list-style-type: none"> <li>❖ Goal setting worksheet</li> <li>❖ First meeting checklist</li> <li>❖ Mentoring partnership agreement</li> </ul>
<p><b>Step 2:</b> Capacity Needs Self- Assessment &amp; Action Plan</p>	<ul style="list-style-type: none"> <li>❖ Discuss aspirations, career development pathways, code of ethics and values for decision making.</li> <li>❖ Complete Capacity Needs Self-Assessment &amp; Action Plan</li> </ul>	<ul style="list-style-type: none"> <li>❖ Reflect on career development trajectory, professional goals, motivations, ethics and value systems for decision making</li> <li>❖ Complete Capacity Needs Self-Assessment &amp; Action Plan</li> </ul>	<ul style="list-style-type: none"> <li>❖ Provide guidance to mentee's preparation of their capacity needs self-assessment &amp; action plan</li> <li>❖ Share information about career development and new goals</li> </ul>	<ul style="list-style-type: none"> <li>❖ Capacity Needs Self-Assessment and Action Plan template</li> <li>❖ Code of conduct</li> <li>❖ Value sets</li> </ul>
<p><b>Step 3:</b> Mentoring/ Coaching</p>	<ul style="list-style-type: none"> <li>❖ Discuss intended goals/outcomes for each sessions</li> <li>❖ Discuss topics and/or high priority issues</li> <li>❖ Complete learning log</li> </ul>	<ul style="list-style-type: none"> <li>• Reflect on office work for the week/month – what are the issues you need guidance on.</li> <li>• Discuss follow-up work agreed in previous discussions (refer to the learning log)</li> </ul>	<ol style="list-style-type: none"> <li>1. Reflect on previous learning logs and discuss progress – provide guidance on the follow-up action section.</li> <li>2. Complete learning log</li> <li>3. Submit learning log to PLP-ESS coordinator</li> </ol>	<ul style="list-style-type: none"> <li>❖ Learning Log</li> </ul>
<p><b>Step 4:</b> Closure &amp; Evaluation</p>	<ul style="list-style-type: none"> <li>• Share feedback on the mentoring sessions</li> <li>• Discuss preparations for closure vis-à-vis the closure worksheet</li> <li>• Arrange time to complete the online evaluation form</li> </ul>	<ul style="list-style-type: none"> <li>• Reflect on mentoring journey – what worked and what didn't</li> <li>• Acknowledge each other's contribution</li> <li>• Complete the online evaluation forms</li> </ul>	<ul style="list-style-type: none"> <li>• Reflect on mentoring journey – what worked and what didn't</li> <li>• Acknowledge each other's contribution</li> <li>• Complete the online evaluation forms</li> </ul>	<ol style="list-style-type: none"> <li>1. Closure worksheet</li> <li>2. Online evaluation forms (i.e. survey monkey)</li> <li>3. Evaluation report</li> </ol>

## Engaging with Mentee

It is important to understand what motivates your mentee. While some people are driven by a need for achievement, others value relationships, recognition and job security. It is also possible that what motivates you will not motivate your mentee, so the best way to identify motivators is to listen and ask probing questions. Always try to relate to the experience, issues and concerns of your mentee, and be *respectful of cultural differences*.

## Communication Skills to Build Trust and Facilitate Learning

People learn and process information in a variety of ways. In the course of your mentoring relationship it is important to use approaches that draw on different learning styles. There are many ways to encourage growth and development of others—you undoubtedly have found a number of things that have worked well for you in the past.

One of the most important ways to build trust is through good communication. Here are some time-tested approaches to communication and examples that can help you effectively promote the learning of your mentee.

APPROACH	EXAMPLE
<ul style="list-style-type: none"> <li>Convey positive intent</li> </ul>	<ul style="list-style-type: none"> <li>Gestures like nodding one's head, maintaining open body posture</li> <li>Maintaining eye contact</li> </ul>
<ul style="list-style-type: none"> <li>Ask open-ended questions to encourage comprehensive and thoughtful responses, stimulate reflection, and challenge thinking.</li> </ul>	<ul style="list-style-type: none"> <li>What is your greatest concern?</li> <li>What do you think would be a good way to...?</li> <li>Where have you seen the problem occur?</li> <li>Have you thought about.....?</li> </ul>
<ul style="list-style-type: none"> <li>Paraphrase what your mentee said using your own words.</li> </ul>	<ul style="list-style-type: none"> <li>So, the members of the team haven't been honoring their commitments.</li> <li>If I understand what you are saying, your ideal outcome for the situation is.....</li> <li>I think what I heard you say was.....</li> </ul>
<ul style="list-style-type: none"> <li>Summarize learning and actions at the end of each meeting; omit judgment and opinions</li> </ul>	<ul style="list-style-type: none"> <li>We've agreed that you will work on putting together a plan and send it to me by next Friday?</li> <li>It would work better for you if I would do.....</li> <li>Today we discussed.....</li> </ul>
<ul style="list-style-type: none"> <li>Allow for silence during your conversations. Since it can have multiple meanings including confusion or discomfort—encourage reflection by asking the person what it means for them.</li> </ul>	<ul style="list-style-type: none"> <li>What are you thinking?</li> <li>You seem hesitant...</li> <li>What isn't clear?</li> </ul>

## Preparation for meetings

Before your first meeting, set aside time to reflect on the following:

- What are your assumptions about being a mentee or mentor?
- What is important to you in a mentoring relationship?
- How do you want to grow professionally through the mentoring relationship?
- What are your expectations of your mentor or mentee?



- What motivates you?
- What career pathway are you pursuing? Do you see yourself continuing or growing in the field of EIA/Safeguards management? Where do you see yourself in the next 10 years?
- What values do you have that underpin your decision-making?
- Does your office have a code of conduct (CoC) for professional conduct and if so, how have you aligned yourself to the CoC?

### Identifying Learning Goals for Mentee

Think about where you are in your career, what you want to do and where you want go in the future. Reflect on feedback you have received from your manager, performance evaluation, leadership assessments and other sources. Spending time to take stock of your needs and expectations will prepare you to set meaningful learning goals. It is impossible to achieve a goal that has not been clearly articulated. It's equally important for your mentor to understand and agree with your goals so that you are not working at cross-purposes. Your mentor will usually have insights that will help you better refine your goals, and it's advisable to discuss them with him/her before finalizing them.

Consider your current position and the work you are doing. What is satisfying? What is challenging?

- Where do you want to be in 1, 3, 5 or 10 years?
- How do you see your professional contribution and impact changing?
- What are your manager and colleagues expecting of you?
- What feedback have you received? What is your professional reputation?
- What new assignments will you be taking on?
- What skills, knowledge and experience will you need to be successful?
- What are the gaps in skills or abilities that you feel need to be filled?

### Learning Style

Research tells us that people learn in a variety of ways—some by doing, others by listening or observing. Since not everyone learns in the same way, it is important for you to understand your own learning style. Be sure to communicate with your mentor about how you learn best. Learning as part of a mentoring relationship is active learning so you should also be open to trying new things.

### Fostering Virtual Relationships

Engaging in a long-distance mentoring relationship can be just as rewarding as one where the partners are co-located. Although more complicated since you are not physically present to observe visual clues and cannot hear the tone in written words, it is possible to have a productive relationship if you observe a few simple practices:

- 1) Dedicate more time to building the relationship at the beginning
- 2) Strictly adhere to agreed-upon ground rules
- 3) Increase frequency of communication between partners
- 4) Establish guidelines for sharing confidential information in writing

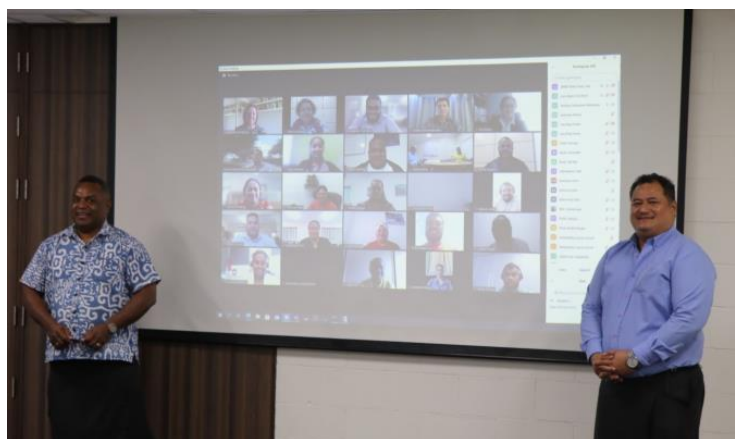


Photo 2: SPREP and WB virtual PLP Training

- 5) Be sensitive to demands of work and time zone of partner
- 6) Experiment with different methods of connecting to find the most effective way to communicate

### **Planning for Closure and Transition**

It is important to have a plan for handling the end of your mentoring partnership. By taking a few minutes during your first meeting to discuss how you will handle the transition of your relationship, you will minimize the risk of unfulfilled expectations whether the conclusion of the relationship is expected or un-expected.

### **Acknowledge Contributions**

Most mentoring pairs will choose to acknowledge their work together in some way. A written expression of appreciation, a note of encouragement or a small token symbolizing a shared interest is a meaningful remembrance. You may even want to plan a special event such as lunch to celebrate. For mentoring pairs who elect to redefine their relationship and maintain contact with each other, each party should be open about their desires and negotiate relationship terms that are mutually acceptable.

### **Document Mentoring Activities**

Make sure you take the opportunity to document your mentoring contribution or involvement. There are currently several places to do so through the use of the tools and templates such as:

- Goal setting worksheet
- First meeting checklist
- Mentoring partnership agreement
- Capacity needs-self assessment and action plan template
- Learning log
- Closure worksheet

Templates can be found in the tools and templates section of this handout (next page).

## Getting Started

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Some mentees may know just what they want to discuss from the first meeting. Some may need more encouragement to open up. Some mentees can be keen on more structured meetings and have a detailed plan while others prefer more spontaneity. There is no right mentoring formula. All of these approaches and preferences are okay! Aim to simply get to one another at first and communicate expectations and preferences. Together you will figure out what works best for both of you. Also, keep in mind that if you've been a mentor before, the way you communicated last time may not work this time. Many factors influence communication in a mentoring relationship including interpersonal chemistry, years of experience in the Organization, one's cultural background and one's personality type, to name a few. For both first-time mentors and mentees, we recommend that you consider the following steps to guide you for throughout the 6 sessions.

### 1. Sessions 1 [First Session] – Establishing Connection

After brief introductions, the mentor will invite the mentee to discuss the code of conduct and mentoring agreement. Framing the mentoring goal statement is a shared responsibility between the mentor and mentee. There could be more than 1 goal statement to reflect the expectations from both the mentor and mentee.

As the first meeting focuses on the mentor and mentee getting to know each other, it is therefore important to connect by learning about each other's interest and opinion which will help to build trust and understanding. Rather than shooting straight into a more serious dialogue, we recommend a casual approach with questions like 'Which country would you like to travel to?', 'Who is your hero?', 'What are your hobbies? Are you a morning or night person? Etc. You will find it easier to connect on an informal discussion which in turn, helps to build rapport and provide a gentle introduction to the discussion of more series planning that will start in session 2.

The mentor and mentee will discuss and agree on the frequency of meetings, scheduled dates and time for all 6 sessions, virtual platform for calls such as webex, MS teams, zoom, facebook messenger, whatsapp etc. It is the responsibility of the mentor to organize calendar invites for all 6 sessions.

Please refer to the Goal Setting Worksheet, First Meeting Checklist, the Code of Conduct and the Mentoring Partnership Agreement which are included in the latter pages of this guideline. At the end of the first session, the mentoring partnership agreement has been signed by both the mentor and mentee and shared with the PLP mentoring coordinator. As this is the 1<sup>st</sup> meeting, there is no need to complete a learning log.

### 2. Session 2 – Capacity Needs Self-Assessment & Action Planning

The mentor will open up session 2 with an explanation about the key activity planned for the mentee to complete. The activity is called the capacity needs self-assessment and action planning. This focuses

on the mentee's use of a simple and straight forward table (refer to the capacity needs self-assessment and action planning table in the mentoring tools and templates section below) that will attempt to define the mentee's professional career goal(s), and then listing down their individual baseline capacity with particular emphasis on capacity gaps and their corresponding actions to address them.

It may prove useful for the mentor to guide the mentee by setting a few examples for starting to populate the table. The mentor should take time to help the mentee frame a statement for his/her career goal. There may be more than one goal in which case, the mentor can determine whether to have multiple capacity assessment tables for the mentee to complete or guide the mentee to forge an integrative statement that can capture more than 1 goal. It is important to note that this exercise is designed to help the mentee to improve self-awareness about his or her capacity to do her job as an EIA or Safeguards staff.

IMPORTANT: Both the mentor and mentee must remember to complete the learning log straight after this. You may access the learning log template in the mentoring tools and templates section below).

### 3. [Session 3](#)

The mentor will open up session 3 with a discussion about session 2 learning logs. The mentee is invited to share his /her learning log first to be followed by the mentor. This is also a good time to reflect and discuss the mentee's capacity building self-assessment and action planning table and how this maybe a useful activity to repeat from time to time. Either the mentor or mentee may wish to open up a follow-on discussion about the actions needed to address the capacity gaps – mentors can share his/her networks from around the region including opportunities that exist or in the horizon which can add value or simply contribute to the mentees action plan. It is important for the mentee to note that for his/her action plan to succeed, she/he must take full ownership in mobilizing personal actions to address and improve their own individual capacity.

### 4. [Session 4](#)

This session is dedicated to the learning about ethical behavior and values that is often associated with the EIA and Safeguards profession. The mentor will open up the discussion by explaining the importance of adherence to ethics and values that informs decision-making. Doing well and growing in the EIA and Safeguards profession depends on the application of ethical behavior – “The search for excellence, whatever it may be, begins with ethics (Robert Solomon 1997)”. Different professional bodies have their own Code of Ethics and often, organizations will have clearly defined standards of practice. The mentor may wish to ask the mentee about their organization's Code of Ethics (Government Ministries and Departments are subject to the Public Service Commission's Code of Ethics) and discuss how this is practiced at work. Special attention should be directed to '*Ethical Dilemmas*' where the mentee is asked to explain various examples of situations that he/she felt was challenging for them at work. The mentor should take time to nurture the dialogue towards the identification of what is right or wrong and why that is the case.

An ethical practitioner/professional should be able:

1. Differentiate between acts that are good and bad.
2. Do what they believe is to be right.
3. Refrain from doing what they believe to be wrong.

Ethics are closely related to behaving in a moral way. Personal and cultural values play an important part in ethical decision making. However most ethical dilemmas are complex and do not have a clear right or wrong answer. The mentor may wish to explore more about the mentee's culture and values carefully with the view of understanding why the mentee believes in a certain way. The mentor may wish to share his/her experience in the past or present in dealing with similar circumstances. By sharing and comparing, both the mentor and mentee will get a sense of appreciation about the difference cultural perspectives and values that underpin their decision-making but attention should be directed towards reaching a consensus about what is considered as 'best practice to achieve ethical standards' in the EIA and Safeguards profession.

An example of an ethical dilemma is:

1. Dual roles: sometimes it is impossible to avoid a conflict of roles in an organization, but it is worth being aware of how roles such as being a line manager, a friend, a competitor, a superior may impact on a person's ability to behave ethically at work. This is more so for sub-ordinates who often find themselves in a predicament of having to choose between their morals/values and others', especially superiors/senior staff's insistence of doing something that appears or is at conflict with ethical behavior. In many cases, the default reaction is to acquiesce and therefore, discussions should include best practices to document opinions along various intervals of a decision making process at work. Sometimes, dual roles may prevent professional growth to practice ethical behavior, but with open discussions and acknowledgement of the conflict of interest, this can go a long way to carefully navigate between what is right from what is wrong behavior at work.

There are many examples of professional values that can be found on the internet. One of them is [15 Professional Values for a Successful Career | Indeed.com](#) and the mentor can use this to guide discussions for the session 4. Please remember to complete your learning logs.

## 2. [Session 5](#)

This session is open to discussing pertinent issues that the mentee wishes to raise with the mentor. It may also be used to discuss residual issues left uncovered from previous sessions, particularly the capacity building self-assessment and action planning exercise covered in session 2. Additionally, discussions may focus more on the career pathways and actions that the mentee can explore as a way of advancing careers in EIA and Safeguards management in the place of work of the mentee. The mentor may wish to offer guidance on training opportunities that exist in the PLP partnership or other training platforms that are available such as the World Bank's [Open Learning Campus](#) (OLC), SPREP's [Pacific Network for Environmental Assessment](#) website, University of the South Pacific's new Post-Graduate Diploma for

Islands and Oceans Stewardship under [PACE-SD](#), and the Asian Development Bank's [E-learning](#) platform for Environment and Social Safeguards.

Additional sites that could be shared may include the [New Zealand Association for Impact Assessment](#) and the [International Association for Impact Assessment](#).

### 3. [Session 6 \[Final Session\]](#)

The final session is dedicated to wrapping up the mentoring sessions. The mentor should use the closure worksheet to guide the final discussions by going through the menu of questions. Both the mentor and mentee may use the learning log to record the key points of their discussion and should be shared with each other a few days after the final session. The mentor should ensure that all learning logs are collected and compiled and share with the PLP mentoring. The mentor should also remind the mentee about completing the online evaluation form that will be sent by the PLP coordinator. An email will be sent to both which contains the url link on survey monkey for the evaluation.



## 2. MENTORING TOOLS AND TEMPLATES

### Goal Setting Worksheet

Well-defined goals are the foundation of a productive mentoring relationship. Use this worksheet to develop the goals you will discuss with your mentor when you create your partnership agreement.

#### Goal Inputs

Mentoring goals should be aligned with business direction and existing performance expectations. Information from the following sources will be helpful when identifying your mentoring goals:

- Performance feedback
- Development plan
- Leadership assessment
- Input gathered from other sources—manager, peers, direct reports, clients etc.

#### Goal Setting Criteria

The “SMART” criteria we utilize in our performance management process also provide an effective framework for writing well-defined mentoring goals.

- **Specific:** Concrete and clear.  
*What will you know or be able to do as a result?*
- **Measurable:** Seeks improvement that can be demonstrated or measured.  
*How will you know if you achieve your goal?*
- **Action Oriented:** Requires effort and time.  
*What will you do differently as a result?*
- **Realistic:** Achievable, practical.  
*Can it be accomplished with reasonable time and support?*
- **Time-bound:** Can be completed within the timeframe of the mentoring cycle.  
*What is the target for completion?*

To clarify your objective, it might be helpful to think in terms of the following four elements for each mentoring goal:

- What action? \_\_\_\_\_
- For what result/impact? \_\_\_\_\_
- How will success be measured? \_\_\_\_\_
- By when? \_\_\_\_\_

Be sure to review and reassess objectives at the mid-point and completion of your mentoring relationship, and in the event of changes in job responsibilities, skill requirements or occurrence of a significant business event.





## First Meeting Checklist

Getting to know your mentee or mentor is a critical step in creating a successful partnership. Make sure you devote a significant amount of time at your first meeting - or take multiple meetings - to learning about each other— including interests outside of work.

### ○ Get Acquainted

- Share information about your professional experience and personal life.
- Learn about your partner's professional experience and personal life.
- What events, books, experiences have had the greatest impact on you? Why?
- Discuss previous mentoring experiences.
- Understand each other's expectations, concerns and vulnerabilities.
- Share learning style preferences.

### ○ Established Guidelines and Ground Rules

1. Where will our meetings take place?
2. How long will we meet?
3. How frequently will we meet?
4. How will meetings be scheduled?
5. Who is responsible for what?
6. How will we communicate informally between meetings?
7. How will we manage our relationship if one of us is on mission?
8. What is the agenda/format for our meetings?
9. How do we define confidentiality?
10. What are the boundaries for our interactions? What topics are off limits?
- 11.** How will we measure success?

### ○ Start Partnership Agreement

1. Agree on mentoring objectives.
2. Define ground rules.
- 3.** Modify Partnership Agreement as needed.

### ○ Determine Next Steps

1. Review actions and plan out future meetings .



## Mentoring Partnership Agreement

**Mentor:**

**Job Title:**

**Mentee:**

**Job Title:**

**Mentoring Goal Statement:**

**Key Learning Objectives and Measures of Success:**

- 

### Code of Conduct (CoC)

**Scope:** A mentor does not give advice, rather helps the mentee to weigh up situations, through a process of reflection, questions, challenge and feedback allowing the mentee to come to a decision themselves. The mentor will conduct themselves with dignity and will act in a way which respects diversity and promotes equal opportunities.

#### Mentoring Code:

- The mentor's role is to respond to the mentee's needs and agenda; it is not to impose their own agenda.
- Mentors will agree with the mentee how they wish the relationship to work adopting the most appropriate level of confidentiality
- Mentors will be aware of, and adhere to any current legislation relating to activities undertaken as part of the mentoring service.
- The mentee should be made aware of their rights and any complaints procedures.
- Mentors and mentees will respect each other's time and other responsibilities, ensuring they do not impose beyond what is reasonable.
- The mentor will ensure the mentee accepts increasing responsibility for managing the relationship; the mentor will empower them to do so and will promote the mentee's autonomy.
- Either party may dissolve the relationship at any time throughout the period of the mentoring relationship.
- The mentor will not intrude into areas the mentee wishes to keep private until invited to do so. They should, however, help the mentee to recognize how other issues may relate to these areas.

- Mentors will open and truthful with themselves and their mentee whilst participating in the mentoring relationship
- Mentors will share the responsibility for the smooth winding down of the relationship with the mentee, once it has achieved its purpose – they must avoid creating dependency.
- The mentoring relationship should not be exploitative in any way, neither may it be open to misinterpretation.
- Mentors should never work beyond the bounds of their capability, experience and expertise to the point where they do not feel confident in providing the mentee with proper support. Where appropriate, mentors should seek advice or refer mentees to another point of contact or enterprise support professional.
- The confidentiality of the client remains paramount at all times. At no time will a mentor disclose any part of the relationship to any person whatsoever, without the explicit agreement of the client. Any notes or other records of mentoring sessions shall remain, at all times, the property of the client. They may, for convenience, be retained by the mentor but may be requested by the client at any time.
- Mentors have a responsibility to highlight any ethical issues (such as conflicts of interest) that may arise during a mentoring relationship at the earliest opportunity.
- Mentors should not attempt to do the mentees job for them - the mentee has the ability and the potential, the mentor's job is to help them realise it.
- Mentors will maintain their professional competence through participation in continuous professional development.

**Mentor:**

**Mentee:**

**Date:**

**Date:**





### Learning Log Template

<b>Mentor/Mentee</b>	
<b>Session</b>	
<b>Check-In Date:</b>	
<b>Important Issues:</b>	
<b>Development Objectives:</b>	
<b>Follow Up Action:</b>	
<b>Questions for Further Reflection</b>	
<ul style="list-style-type: none"><li>• What are the key take-aways from our meeting?</li><li>• How do they relate to my mentoring goals?</li><li>• In what ways can I apply the knowledge, information or skills I've acquired?</li><li>• In what area(s) can my mentoring partner offer additional insight?</li></ul>	

## Closure Worksheet

It's important to formally close your mentoring partnership at the end of the mentoring cycle. Take the time to reflect on what you are taking away from the experience and how you have grown. Closure is also a good time to acknowledge your accomplishments. Below is a worksheet to guide you through the closure phase.

<b>Planning</b>	<ul style="list-style-type: none"> <li>❖ What would you like to happen when your mentoring relationship ends?</li> <li>❖ How do you want to structure your closure conversation?</li> <li>❖ How will you ensure that your relationship reaches a positive learning conclusion?</li> <li>❖ What might get in the way of a positive learning conclusion?</li> </ul>
<b>Learning Conclusion</b>	<ul style="list-style-type: none"> <li>❖ What worked well for you in the relationship?</li> <li>❖ What did you learn? Did you achieve your goals?</li> <li>❖ What did you learn about yourself?</li> <li>❖ What did you learn about mentoring? About being a mentor/mentee?</li> <li>❖ What would you do differently next time?</li> <li>❖ What do you still have questions about?</li> <li>❖ What were you most surprised to learn?</li> </ul>
<b>Integrating Learning</b>	<ul style="list-style-type: none"> <li>❖ How will you apply what you learned?</li> <li>❖ Name one thing you plan to share with your colleagues.</li> <li>❖ What will you do differently as a result of what you've learned?</li> <li>❖ What is going to be your biggest challenge in applying your learning?</li> <li>❖ What is your action plan for continued learning?</li> </ul>
<b>Celebrating Success</b>	<ul style="list-style-type: none"> <li>❖ What are some meaningful ways to celebrate what you've accomplished?</li> <li>❖ How might you express your appreciation to your mentoring partner?</li> </ul>
<b>Redefining the Relationship</b>	<ul style="list-style-type: none"> <li>❖ Your relationship with your mentoring partner will be different once the relationship ends. You may decide to continue the relationship informally. Talk about these changes before they take place.</li> </ul>
<b>Moving On</b>	<ul style="list-style-type: none"> <li>❖ Once you have redefined your relationship, it's time to let go of what it was and embrace what it will be.</li> <li>❖ What will your next steps be?</li> </ul>