

PMI UK

Mentoring Handbook

Version 2.0

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Change history

- Feb 2015: Version 0.90 - Initial document approved for website for pilot
- May 2015: Version 0.91 – Changes made after training webinar
- May 2018: Version 2.0 – Revised to align with new website format

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1 Introduction

1.1 Background

The PMI UK Chapter Mentoring Scheme is an opportunity available to PMI UK members to develop as professional project managers. The scheme started in 2015 and leveraged work previously performed by PMI UK Chapter and the PMI Sydney Chapter (both influenced by other PMI chapter Mentoring schemes).

1.2 Purpose of the scheme

PMI UK provides a free to members Mentoring scheme with the following aims:

- Improving the project management skills of the Mentee
- Career development;
- PM specific soft skill development

Our Mentoring Program will not cover:

- Seeking of job opportunities or help in certification.

Our role is to connect suitable mentors and mentees, support the initial engagement and provide ongoing support as needed.

1.3 What is Mentoring?

Mentoring is a powerful personal development and empowerment tool. It is an effective way of helping people to progress in their careers and is becoming increasingly popular as its potential is realised. It is a partnership between two people (Mentor and Mentee) normally working in a similar field or sharing similar experiences. It is a helpful relationship based upon mutual trust and respect.

A Mentor is a guide who can help the Mentee to find the right direction and who can help them to develop solutions to career issues. Mentors rely upon having had similar experiences to gain an empathy with the Mentee and an understanding of their issues. Mentoring provides the Mentee with an opportunity to think about career options and progress.

A Mentor should help the Mentee to believe in herself and boost her confidence. A Mentor should ask questions and challenge, while providing guidance and encouragement. Mentoring allows the Mentee to explore new ideas in confidence. It is a chance to look more closely at yourself, your issues, opportunities and what you want in life. Mentoring is about becoming more self-aware, taking responsibility for your life and directing your life in the direction you decide, rather than leaving it to chance.

This Mentoring scheme expects the Mentor to be more experienced than the Mentee to pass on specific advice and examples from their own experience. It is designed to provide Chapter members with access to a Mentor, an experienced professional who can help them improve their professional skills in the project, program and portfolio management disciplines, according to their needs stated on application.

1.4 Goals of the Program

The goals of the PMI UK Mentoring Program are to:

- Contribute to the individual growth of our Chapter members
- Help Chapter members develop project, program, and portfolio management skills
- Provide Chapter members with the opportunity to build their networks and improve their networking and communication skills.
- Enhance the reputation of PMI UK by providing a valuable service to its members.

2 What Mentoring is and isn't

Mentoring should be:	Mentoring should not be:
<ul style="list-style-type: none">• An ongoing relationship for learning and development• Guiding someone towards their goals, as well as inspiring and supporting• Mutual sharing of experiences and opinions towards agreed outcomes• Flexible and at times even informal,	<ul style="list-style-type: none">• An opportunity to correct someone's behaviours or actions• Directing someone to meet goals• Being the expert with all the answers• About trying to address personal issues

2.1 Timeframe

Mentoring can be either a short term relationship of a few weeks or a long term relationship of a few years – it depends on the goal of the individual. PMI UK Chapter recommends setting an expectation of the Mentoring relationship lasting a period of 6 months; another 6 months can always be contracted.

2.2 Level of formality

The Mentor and Mentee shape the nature of the relationship together. Some Mentoring partnerships are more informal, taking place as and when the Mentee needs advice, guidance and support. Other relationships are more structured where there are set times for meeting for a predetermined period of time. PMI UK Chapter recommends that there is a formal agreement about how the relationship will be structured, at the start of relationship and both parties regularly review how well the relationship is working.

2.3 Relative levels of experience

The matching of Mentors and Mentees will aim to ensure the Mentor has more experience than the Mentee in the area of focus. However, there may be aspects where the Mentee has more experience.

2.4 Benefits of Mentoring

Mentee benefits:

- Having someone independent to talk openly too
- Gain a wider perspective one's career and immediate tasks
- Time and help reflecting on new ways of thinking
- Access to knowledge and experience
- Improved confidence leading, coping with difficult situations, and resolving problems

Mentor benefits:

- Practice interpersonal skills
- Realising one's own skills
- Satisfaction from contributing to the success of others and growing global project management capability
- Open up new ways of thinking

3 Register

Potential Mentors and Mentees submit applications to join the Mentoring Scheme.



3.1 Registration process

1. On the website, there is a link to the Google Form to register for the scheme. It is the same for Mentor, Mentee or both. The application forms capture information about the candidate's background, experience, and Mentoring goals/experience. To avoid duplication, we ask for your LinkedIn profile URL for the details of your career.
2. Within 7 days, the Mentoring team will review your application and let you know that they are starting the matching process. Matching may take longer depending on how many Mentors and Mentees we have available.

Mentoring tends to be more successful when the Mentor and Mentee profiles are well captured - please take the time to consider and write what is important to you.

3.2 What makes a suitable Mentor

The Mentor's role is to provide support and guidance to Mentees, providing the Mentee with development opportunities based on agreed objectives.

- Should be a senior programme or project manager, with at least 7 years' experience in project or programme management and have previous demonstrable experience in Mentoring or coaching.
- Must be a current member of the PMI UK Chapter
- Should be successful professionals with the right attitude to support knowledge transfer to the Mentees.
- Should participate in training offered and PMI UK Mentoring network

Please note that this is an unpaid, volunteering role.

3.3 What makes a suitable Mentee

The Mentee's role is to ensure that the scheme is used as an opportunity for personal development, based on agreed objectives. The most suitable Mentor required to achieve that goal is not necessarily someone more senior.

- Should participate in training offered and PMI UK Mentoring network
- Should be employed, with at least 2 years demonstrable experience in project management.
- Must articulate clear and specific development goals relevant to their current role or career stage - this helps Mentor matching and will help frame the Mentor's approach.

3.4 Behaviours

Mentors and Mentees must abide by the PMI UK Mentoring Code of Conduct and the PMI Code of Ethics and Professional Conduct.

4 Connect Mentor and Mentee

The Mentoring Team will review the applications from Mentee and Mentors and will do a first cut pairing exercise.



4.1 Connect (matching) process

- The Mentoring Team will review the applications from Mentee and Mentors and identify a good match. Where necessary, they will contact the candidates for more information. Mentors and Mentees will be matched according to geography, industry, and matching interests on the application form.
- LinkedIn introductions are sent out along with an introductory email that includes the profile information used in matching.
- All participants to attend 1-2 hours of training and introduction session/s given by the Mentoring team. The training sets the expectations for how PMI UK's Mentoring activities are to be conducted after which Mentor and Mentees can have a conversation to ensure they're happy with the pairing. This is also the time for Mentor and Mentee establish objectives and high-level plan for the Mentoring period.
- Within the next week, Mentors and Mentees must confirm their formal relationship by completing the online Mentoring Agreement.
- Mentor to organize the first meeting and set the goals for the future meetings

In the case of a mismatch in expectations Mentee/ Mentor can call off this Mentoring pairing and request new pairing from the Mentoring team.

5 Engage

Mentor and Mentee will meet and work together on their mutual learning journey. If required, refine the goals of the Mentoring relationship as necessary. During the Mentoring program they need to review their progress and satisfaction and record it, by sending their reports to the Mentoring team.



5.1 Responsibilities of the Mentor

- Send out meeting request for the next session (or sessions if it helps to book these in advance). Include an agenda that helps to remind the Mentee of the areas that you agreed to discuss and any actions which the Mentor and/or Mentee agreed for the next meeting
- Update the Mentoring team every 3 months to confirm that the relationship is still active and provide feedback to help improve the scheme
- If you would like to claim PDUs, it is important that you record the key information about the session
- To communicate with the Mentee, Mentor supervisor or Mentoring team, if at any time they feel that the relationship is running into trouble

5.2 Responsibilities of the Mentee

- To attend meetings as agreed with the Mentor
- Summarise the learnings that you have gained from the session and the actions agreed. Develop and agree personal objectives
- Update the Mentoring team every 3 months to confirm that the relationship is still active and provide feedback to help improve the scheme
- If you would like to claim PDUs, it is important that you record the key information about the session
- To communicate with the Mentor, Mentor supervisor or Mentoring team, if at any time they feel that the relationship is running into trouble

5.3 Mentoring Meeting Record

To build on the discussion and keep the relationship going, it is useful to agree in advance who will be responsible for record keeping and logistics. Mentors and Mentees are encouraged to discuss and agree on the level of formality they will apply to the record keeping for their Mentoring sessions and the following is a guide:

5.4 Support from the Mentoring Team

If all goes well, you should be able to structure and manage the regular sessions between the Mentor and Mentee without any help. However, if you need support, please contact us as we have experience in helping get the most out of mentoring and are here to help you.

6 Hints and Tips for Success

6.1 Be organised

As a lower priority than many of the work or home commitments, being well organised helps to keep the mentoring going and be an effective use of time.

- Meet at scheduled times and aim to have regular structured interaction. Both parties should commit sufficient time to Mentoring sessions. Try to maintain regular communication between Mentor and Mentee.
- Be aware (Mentors and Mentees) of your roles & responsibilities. A clear understanding of the Mentoring process will go in a long way towards achieving success.
- Setting a time frame for the Mentoring relationship up front helps to know when to say goodbye and to transition from the Mentoring.
- Mentees should:
 - Take the initiative to propose the agenda and discussion topics.
 - Mentees should initiate contact after the initial meeting.
- Mentors should
 - Be willing to commit the time and energy to provide support for their Mentee.
 - Initiate contact with the Mentee
 - Challenge the Mentee to develop a plan of success and offer to provide feedback to improve the plan
 - Help the Mentee create a foundation of resources and support, in addition to your Mentoring relationship

6.2 Manage the time effectively

- Proper ambience must be ensured for conduct of the meetings.
- Mentees should:
 - Keep notes on meetings and be prepared to review the notes prior to the next meeting. Set goals & actions. Review your action items. This is the starting point for the learning cycle
 - Respect your Mentor's time
 - Resist the temptation to cancel sessions at the last minute.
- Mentors should
 - Make your commitments to your Mentee a top priority – avoid postponing or cancelling meetings
 - Remember that there are multiple ways to reach goals. Support the Mentee to the best of the ability, but success or failure is the Mentee's responsibility
 - Be aware of the goals of the Mentoring relationship. If it appears that the focus of the sessions is drifting away from the agreed goals, raise this with the Mentee and adjust the goals if needed.

6.3 Develop Trust

- Maintain honest and open communication to ensure positive outcome.
- Listen and consider alternatives
- There is a strong trust relationship, where confidentiality is maintained.
- Mentor has no supervisory role with Mentee and no other conflict of interest.
- Mentor and Mentee can request reassignment without blame being assigned.
- The Mentor's role is to listen, ask probing questions and give constructive feedback. This is an action learning program for the Mentee, so while it is tempting to jump in and tell them what they should do, it is a far better learning experience for the Mentee if they can get there themselves.
- Maintain confidentiality. This will help the relationship to be honest and upfront.

- Encourage independence not dependence
- Establish rapport early and agree on goals, responsibilities, and expectations, to ensure the relationship gets off to a good start
- Consistently role model successful behaviours, or 'walk the talk', as Mentees learn just as much from your actions as from your advice
- Seek every opportunity to offer support, praise or encouragement, and unconditionally affirm your Mentee as a person of great value
- Actively listen, reflect feelings and clarify alternatives when the Mentee has concerns or difficulties
- Be honest in interactions and be fair in feedback.
- Don't ask Mentor to do the work for you.
- Notify your Mentor of your concerns, problems and questions

6.4 Make the best use of the opportunity

- The initial meeting is face to face (ideally). The pair can then decide on the best way to conduct subsequent Mentoring sessions.
- Mentors and Mentees have a similar background (or have a specific topic to discuss).
- Mentors are willing to stretch themselves to help the Mentees.
- Mentees should consider all ideas from their Mentor and together consider how appropriate they are for their situation
- The key to Mentoring comes back to good active listening skills. Be fully present, focusing on the Mentee and what they are saying
- Seek first to truly understand their situation before leaping in with ideas. Ask insightful, open ended questions that help the Mentee explore their situation
- Don't give advice unless asked
- Don't take responsibility for Mentee program or duties
- Don't allow the Mentee to become dependent on you
- Maintain a positive outlook – do not complain about your own problems
- Don't do the Mentee's work for them.
- Be a good listener
- Give constructive feedback
- Promote Mentee creativity and skill development
- Help Mentee to develop and set goals
- Maintain positive attitude
- Resist the temptation to solve the Mentee's problems and instead empower Mentees to be independent and help themselves when they encounter a problem
- Nurture creativity while tempering with reality and pragmatics and gently shed light on unrealistic expectations
- Set challenging assignments for your Mentee that are tailored to their abilities
- Assume personal responsibility for your professional growth
- Accept constructive feedback willingly
- Be willing to take risks and be open to new ideas
- Main positive attitude
- Demonstrate initiative
- Remember that there is more than one way to reach the goal
- Don't rely on the Mentor as the sole source of support or information
- Don't expect the Mentor to give answers to all your problems - think of Mentor as one suggesting alternatives

7 Mentoring Close

Feedback Phase and the end of the Mentoring relationship.



Whether the relationship lasts a month or a year, there will come a time when it no longer delivers the value that was needed. If you (both) agree that the relationship has reached its natural conclusion there are some actions to help you in the future.

Ideally, the goals of the Mentee and Mentor have been achieved. In all cases, a final formal evaluation should be completed, including lessons learned, and sent to the Mentoring team.

7.1 Responsibilities of the Mentor

- Be clear about the ending, if you expect to continue to talk to the Mentee that's great but ensure there is clarity about your expectations going forwards.
- If appropriate, provide feedback on your experience and areas of focus for the Mentee in the future.
- Update your details so that we know if you are looking for a new Mentor and, enlightened by the last experience, what you are looking for.

7.2 Responsibilities of the Mentee

- Summarise the learnings that you have gained from the experience.
- Thank the Mentor for their time and, if it seems appropriate, give feedback on what they did well and what might have been done differently.
- Update your details so that we know if you are looking for a new Mentor and, enlightened by the last experience, what you are looking for.

7.3 Support from the Mentoring Team

Still interested in being a Mentor or Mentee? Update your details to reflect what you now know about your mentoring goals and contact us as you boldly go to your next Mentoring engagement.

8 Additional resources for Mentoring

8.1 Definitions of mentoring

There is no guide in PMI's Body of Knowledge (PMBOK) about Mentoring. There are different understandings of what Mentoring involves and this programme uses information from a 2012 UK government funded "Get Mentoring" programme (<http://www.Mentorset.org.uk>), for its definition and expectations, as well as Ginger Levin's 2011's paper on 'Mentoring: A Key Competency for Program and Project Professionals.

"Mentoring is to support and encourage people to manage their own learning in order that they may maximise their potential, develop their skills, improve their performance and become the person they want to be." Eric Parsloe, the Oxford School of Coaching & Mentoring

"The People Capability Maturity Model defines it as 'The process of using experienced members of the organization to provide personal support and guidance to less experienced members of the staff' (Curtis, Hefley & Miller 1995 p17)" Levin (2011)

8.2 More information on Mentoring

Five most commonly used techniques in business among Mentors were:

Accompanying, Sowing, Catalyzing, Showing, Harvesting. Aubrey, Bob and Cohen, Paul (1995). Working Wisdom: Timeless Skills and Vanguard Strategies for Learning Organizations. Jossey Bass. pp. 23, 44–47, 96–97.

5 Tips for Mentoring Senior Level Project Managers: Focus on Career Path, Beware of Egos, Discuss More, Direct Less, Provide Positive Reinforcement when Necessary, Learn from the Mentee.

From PMI > Professional Development > Career Central.

<http://www.pmi.org/Professional-Development/Career-Central/5-Tips-for-Mentoring-Senior-LevelProject-Managers.aspx>

The Feeling is Mutual – an infographic of Project Manager Mentor-Mentee Relationships
From PMI > Professional Development > Career Central.

<http://www.pmi.org/Professional-Development/Career-Central/Project-manager-Mentor-Mentee-relationships.aspx>

8.3 PMI Personal Development Units, PDUs

Mentors can apply for PDUs in line with your credential. Please check the latest PDU Category Structure and Policies under 'Continuing Certification Requirements' (CCRS) on the pmi.org website. The following is extracted from current documentation (Feb2015):
Category E: Volunteer Service For being a Mentor on project management topics, 1 PDU awarded for 1 hour of volunteer (not compensated) service.

The PDUs claimed in this category count against the maximum of 45 PDUs The PDUs claimed in this category count against the maximum of 45 PDUs (for the PMP/PgMP credentials) or 20 PDUs (for the PMI-SP, PMI-RMP and PMI-ACP credentials) allowed for the "Giving Back to the Profession" categories (Categories D, E, and F).

Also, it is possible for Mentees to claim PDUs; this is under Category C PDUs for self-directed learning activities which are individualized learning events involving personally conducted research or study.

Documents required upon audit request: For Mentoring services: evidence supporting your coaching or Mentoring arrangement, including notes from and dates of discussions, or reading.

9 Managing the PMI UK Mentoring scheme

9.1 Mentoring Scheme Approach

Our intent is to have six monthly Mentoring assignments. Prior to each intake cycle we will publicise the Mentoring scheme and collect formal applications from Mentors and Mentees. The applications will be assessed by the Mentoring Team.

9.2 Keys to Successful Mentoring

For our Mentoring Program to be successful we need to ensure that we:

- Attract suitable Mentors and Mentees
- Pair Mentees with the most suitable Mentors
- Ensure Mentors and Mentees are clear on their roles and responsibilities
- Provide Mentors and Mentees with the basic guidance on how to conduct the Mentoring relationship
- Constantly monitor the effectiveness of the Mentoring intakes and refine the Mentoring scheme as needed.

9.3 Career development

We'd like to encourage Mentees to use PMI PathPro as well. (See <http://www.pmi.org/Learning/professional-development/PathPro-for-Practitioners.aspx> which focuses on a range of skills including interpersonal and leadership.)

9.4 The Mentoring Team

Professional Development Director: main stakeholder and programme manager

Associate Director Mentoring: project and process management

Mentoring Programme Manager: marketing, scheme operations

9.5 Our responsibilities

- The Mentoring team of volunteers will be maintained until all Mentoring activity has closed.
- The Mentoring team is the first contact point for any issues arising with the programme.
- There will be an independent contact person for any Mentee/Mentor to consult with, in the case of issues related to the Mentoring process
- Relevant training session and focus on facilitation of the Mentor/Mentee initial meetings.
- Conscientious facilitation of the monitoring at 3 months and 6 months
- The effectiveness of the Mentoring Scheme will be regularly assessed. At the end of each 6 month cycle there will be a survey to collect quantitative and qualitative information of the feedback in order to improving the Mentoring scheme.

Following are some of the benefits to PMI UK chapter:

- A service offering for members' development
- Member satisfaction
- An incentive for joining PMI UK Chapter It is also anticipated that members' organisations will benefit from the development of their employees: specifically, the general project manager skills of Mentees and the leadership skills of Mentors.

The performance criteria for the Mentoring scheme are:-

1. Number of active pairings which have resulted in satisfactory outcomes
2. Sustainability of the scheme nationally

3. Amount of volunteer effort involved
4. Expenses

The key performance indicators will be

- The total number of Mentors and Mentees
- The number of successful pairings that reach 6 months ongoing relationship or the Mentee's goal is satisfied
- Mentor and Mentee satisfaction ratings as provided by the surveys at the end of each 6-month relationship
- The Mentoring team and PMI UK Board's assessment of how well the scheme can be sustained with national support throughout the UK