

MENTORING PROGRAM BEST PRACTICES

Guide to building a successful & active mentoring program.



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Communicate Your Intentions

Before getting started with building out your mentoring program, reach out to different constituents to let them know of your plans. This early communication has a variety of different benefits, such as:

- Mentoring task force recruitment – in your communication ask for people to let you know if they have experience to share
- Integration opportunities – do your chapters have local mentoring efforts for you to leverage?
- Awareness, which will feed future promotion including mentor recruitment

Reach Out To:

- Chapter leaders, such as career development or education directors
- Academic leaders who can become your pipeline to student mentees
- Young professional leadership
- Specialty groups that serve niches within your profession
- Retiring and senior members

Establish Your Mentoring Task Force

Create a group of 8–10 people to help make strategic decisions on how the program will be structured. Try to include people from a variety of different roles, including an academic, student, career changer, chapter leader, and national board leader.

Define the Structure

A clear definition of your program will help make it easier for volunteers to commit to serve as volunteers. Fellow organizations have experienced that with undefined mentoring programs, mentor recruitment is a challenge.

To get started, decide if your mentor program will have a limited timeframe. Many people assume that a mentoring program should go on indefinitely until either or both parties are done.

However, the uncertainty of such a time commitment can make it much more challenging to recruit mentors. To make it easier to get people on board, it is recommended to clearly define the length of the program and how often mentors and mentees need to meet. For example, you may decide that a 6 month mentoring program is a reasonable timeframe with the mentor and mentee spending a minimum of one hour per month together on the phone or in person.

Some organizations find success with ending the relationship at their annual conference, since it gives many of the participants a chance to have a face-to-face.

The majority of the work the mentoring task force will perform will be on laying out the foundation structure of the program. Post launch, the group can also be a resource for checking in quarterly or biannually to assess how the program is performing.

Here is a list of questions to ask the mentoring task force to give definition to your program:

- How long will the program run? Six months? A year?
- How many programs will run per year? When will they start?
- What is the minimum for how often will mentors and mentees meet? One hour per month?
- Will the program facilitate both in-person and phone/IM (i.e. Skype) relationships?
- What mentoring topics will the program contain?
- What are the other search filters to include? These can include designations, certifications, career stage, role in company, and specialties.
- What will the role and responsibilities of your mentees include? What will the role and responsibilities of your mentors include?
- Who will be responsible for setting agendas for calls, mentors or mentees?
- How will mentor enrollment work? Are all applicants allowed to participate? Or is there a minimum standard that needs to be met? Will this differ for mentors vs mentees? If a filter is in place, who will manage this process?
- Is the program for members only?
- How will the program be facilitated? Will you have association-led calls? Will there be a support group for mentors or mentees?
- Will mentees be required to fill out any paperwork, such as goal-setting worksheets?
- How are participants recognized? Do mentees receive a certificate? Do mentors get flagged with a digital ribbon?
- Do mentors and mentees get continuing education credits for their participation in this program? If yes, what is the process to fulfill this? (such as the mentee keeping a log of calls and proof of homework assigned/completed)
- Will mentors and mentees fill out an exit interview? If yes, be sure to communicate this early in the program so that they know that they will be assessed on their performance.

Recruit Your Mentors

Now that your program is taking shape, it is time to build your mentor database. You can do this by sending out communications to senior members, to academics, to chapter leaders and to others who might have an interest in serving.

Make sure to explain exactly how the program is structured, how many hours volunteers will serve over the course of a program, and clarify that this can be for one program should they desire to limit their commitment.

Based on how your mentoring program is structured, you might want to communicate that anyone with an interest can serve. For example, a broad outreach such as this means that students could serve as a mentor to those considering choosing this as a major. Young professionals could mentor students getting ready to graduate and retired individuals could mentor mature professionals who are getting ready to retire. It's a good strategy to build out a database.

Decide how many mentors you are going to recruit before launching the program to potential mentees. For an example, with an association of 20,000 members, having a starting database of 50 to 75 mentors would be ok.

As the program is launched, you can provide mentees and/or your mentoring task force with a template letter for them to reach out to potential mentors with an invitation to take part. To do this, have mentees go into the membership directory and search for individuals who would be their ideal mentor. In the list of responses, mentees should look for people who have pictures uploaded to the Connected Community™. This is a quick visual cue that these people have used the Connected Community before and therefore are more likely to use the platform to enroll as a mentor. Below is an example template for your mentees to use which they can send out to potential mentors:

Hi [NAME],

My name is [NAME] and I am from [LOCATION]. I have enrolled in [ASSOCIATION]'s new Mentor-Match program as a mentee. The program is so new that a database of mentors is not yet fully in place. So to help the process along, I searched in the member directory and came up with you as a great potential match. I find your achievements inspiring and would like to learn more about your path to success.

The mentor program is only a few months old and requires that mentors and mentees meet once a month for an hour. It starts with a kick off call. You can learn more MentorMatch here [insert link].

If you are willing to take part, you can please enroll as a mentor [insert link], so I can send you a more official request which is recognized by the association. If you are interested in doing this, please let me know once you've enrolled and then I'll use the mentoring directory to send you the official invitation to be my mentor. You will get this by email and then can visit here [insert link] to accept.

And if you haven't visited the community yet and need a refresher on how to log in to member only pages, go here [insert link] for some help or we can schedule a call and I'd be happy to walk you through it.

Thank you and I will look forward to hearing from you,
[insert email signature]

Build Out Your Platform

Your mentoring task force has now answered a variety of questions of how your platform will be built out. This is where you work in concert with your assigned Project Manager at Higher Logic to put your mentoring program in place. Build out typically takes around two to four weeks' time (depending on potential custom integration requirements).

In the meantime, you can get ready for launch. Work with your public relations team to create a communication plan to let your members know about the new mentoring program. Where do you have opportunities to talk about this mentoring program? Is it through your academic providers so that they can let potential mentees know about the coming opportunity? Or maybe in your newsletter, on your website, in your connected community, through your chapters, and other social media channels such as LinkedIn, Facebook and Twitter? There are a variety of different channels that you can use to reach out to tell people about this opportunity.

If possible, write an article for inclusion in your publication. Ask for stories from mentors and mentees, so that they can share their experiences. This is a great way to put a face on the power of the mentoring program.

Get Ready To Launch

Before launching your program to your full membership, you might consider running the first program with a smaller community of individuals. Even if this community only starts three months early, it would be good to begin a mentoring cycle before exposing your entire membership to the process. This gives your organization a chance to test the process and make sure that everything is working smoothly. This also gives your organization the opportunity to gather testimonials and have members experience the power of the mentoring process so they can help you promote this to others who might be interested in taking part.

Launch To Mentors Initially (Beta Launch)

Once this testing phase has been completed, it's recommended that you officially launch it to mentors initially and only when you have recruited your target number of mentors, should you launch it to your mentees. The last thing you want to do is have mentees search the mentor directory and find no results.

Launch To Mentees (Full Launch)

It's recommended that you let people know of the target start date of the full launch around two to three months in advance. The full launch should happen when you have successfully recruited your target number of mentors and have fully tested the entire process with your task force or volunteer beta users. You can then invite mentees and continue to invite mentors to enroll in the

program. Mentees often enroll and then just sit there. Prompt mentees to search for potential mentor matches. When they find their ideal match, they need to send them an invitation to be mentored. Create a simple, instructional video on the “About Mentoring” landing page to provide an overview of the process for both a mentor and a mentee perspective.

Conclude And Wrap Up

If your mentoring program is for a pre-determined period of time, it’s recommended to send out an exit interview to both mentees and mentors in the final month. Within the exit interview, ask for feedback on the person they were matched with and the program itself. You can also invite the mentees and mentors to provide testimonials for the program within the interview. In this same communication, mention that your organization will “end” the online relationships at the end of the mentoring program (in preparation for the next mentoring campaign).

To “end” the mentoring relationships, it’s recommended that the staff facilitator go into each individual’s record in order to end their mentoring relationship. This action helps the association stay true to the timing that was communicated to volunteers. The association shares that if the mentee and the mentor want to continue, they can enroll in a new mentoring relationship, requesting the same mentor/mentee match.

By ending the relationship, you get the mentor/mentee out of the hot-seat, especially if one person would like to continue but the other is ready to move on.

If your association is leading facilitated calls, you can conclude the program with a wrap up call. This is an opportunity to learn from mentees and mentors on what their successes were and provide them with the opportunity to celebrate with others.

Tips And Tactics

Suggestions on what other organizations have seen works well:

- When first launching your program, limit the number of fields included in the search functionality. The more fields included, the more likely that your small mentor database won’t result in a hit. It is frustrating for mentees to search for a mentor and get no results.
- Six months is a good length for a program. January starts are popular. If running with no overlap, as association can run one program mid-January to mid-July and then another mid-July to mid-January.
- Have mentees fill out a series of worksheets to help define what their strengths, challenges, and goals are for the engagement. Partnering with a coach who understands your industry is of help here.

- Association-led facilitation calls are helpful with framing out the program. These include:
 - A getting started call when the association walks through an outline of the program, including how mentees are to fill out their mentoring worksheets.
 - Six to eight weeks after the kick-off call, a check in call can be held. It's recommended that these are held separate for mentees and mentors so that they feel like they're in a safe space for honest conversation. Hold the mentee check in call first.
 - Then share non-confidential communication from the mentee conversation with the mentors during the mentor's check in call. Questions that can be asked in the check-in calls are how things are going, what conversation topics they focused on so far, if homework is being given, how the mentors or mentors are connecting and any challenges that are being faced.
 - The wrap-up call is held at the end of the program and this is an opportunity for the mentees and mentors to gather and celebrate the completion of the program and the successes they achieved during their time together.
- It's recommended that mentees be the owner of the relationship and they set the agenda.
- Mentees and mentors should decide how much in advance that agenda is communicated to the mentor.
- Another suggested practice is that mentees log the conversations and share those notes with the mentor. In that regard, the mentor can see where the mentee is focused on the conversation that takes place and confirm that the mentee is internalizing correctly what the mentor is sharing. This can also support implementation of a CE process, should your association allow this to be granted.
- The mentor can also provide homework to help bridge the time between their monthly calls and in further enrich their professional development.
- Have the first mentor/mentee call be led by the mentor. This can be a discovery call. During this time, the mentor can help facilitate a joint understanding which will include:
 - Sharing additional background information to confirm there's a good match. If it becomes clear that there is not a good match, both the mentee and mentor should feel comfortable and empowered to step back from the relationship and seek another match.
 - When calls/meeting will be scheduled, ideally scheduling a regular time that can be confirmed for the entire program.
 - How they would like to communicate with each other such as email, text or phone.
 - If the mentee can communicate with the mentor between calls, how the mentor would like to receive those outreaches and how quickly the mentor will respond to those requests.
 - An agreement around whether the mentor will set homework and the limit of how many hours this will be per month so that this is an enrichment for the mentee rather than burden.
 - The importance of confidentiality and trust.

Contact Us

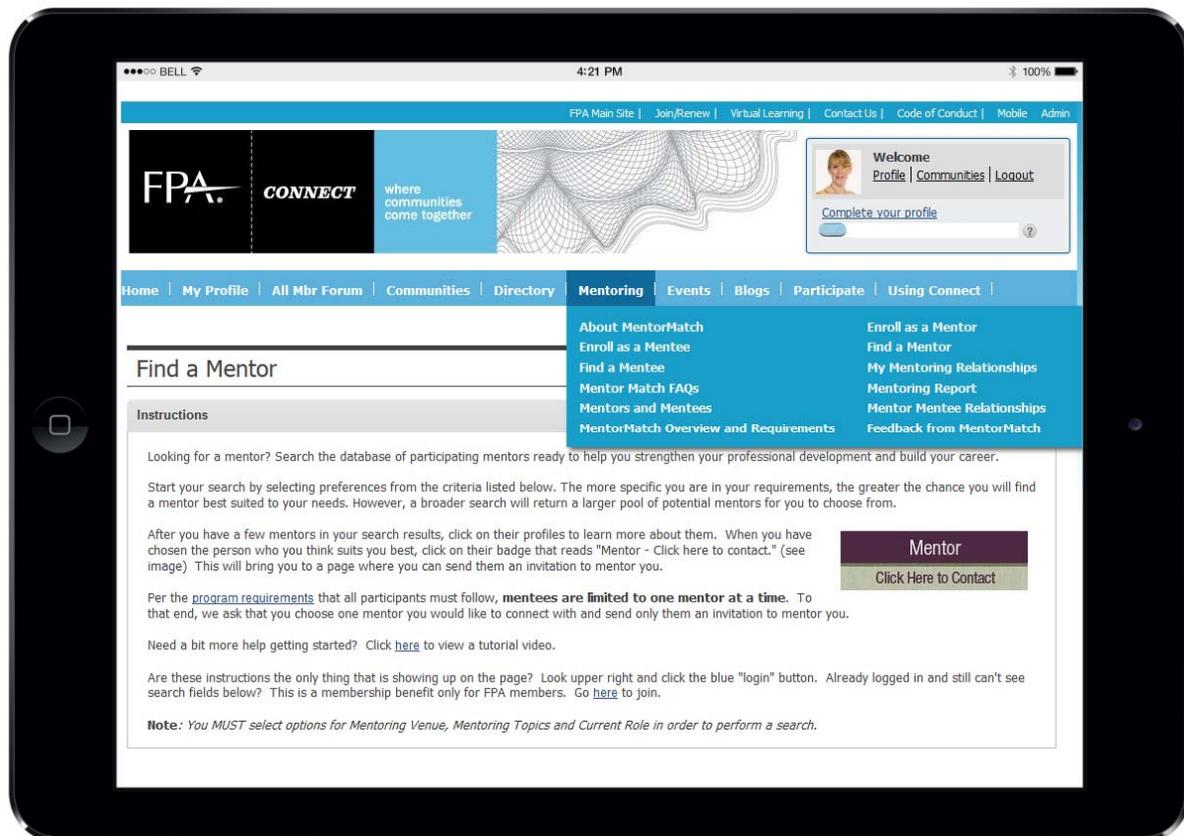
Mentoring Program Best Practices was written because we're passionate about empowering your community members to share experiences across generations and encouraging professional development. When you enable mentorship within your organization, you set the tone for a new generation of educated, informed constituents.

Please use the Higher Logic Mentoring Community to ask questions, seek answers or just brainstorm mentoring related ideas.

We Want To Hear From You!

Join our Mentoring Community Today: <http://hug.higherlogic.com/MentoringCommunity>

Introduce yourself here: <http://hug.higherlogic.com/MentoringIntroduction>. Start by letting others know what you plan to do or are doing with your mentoring initiative.



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