



Project
Management
Institute®
United Kingdom

MENTORING HANDBOOK

Version 2.1

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Change history

- June 2020: Version 2.1 – Updated to align with new PMI branding guidelines
- May 2018: Version 2.0 – Revised to align with new website format
- May 2015: Version 0.91 – Changes made after training webinar
- Feb 2015: Version 0.90 – Initial document approved for website for pilot

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Introduction

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).

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 Scheme 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.

PMI UK Chapter Mentoring Goals

The goals of the PMI UK Chapter Mentoring Scheme are to:

- Contribute to the individual growth of our Chapter members
- Help Chapter members develop project, programme, 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 the PMI UK Chapter by providing a valuable service to its members.

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 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 themselves and boost their 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 decisions and directing your life, 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, programme and portfolio management disciplines, according to the needs stated in their application.



What Mentoring is and isn't

MENTORING SHOULD BE:

- 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

MENTORING SHOULD NOT BE:

- 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

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. The PMI UK Chapter recommends setting an expectation of the Mentoring relationship to last a period of 6 months; another 6 months can always be contracted.

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 pre-determined period of time. The 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.

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.



Benefits of Mentoring

There are positive benefits for both the Mentee and the Mentor:

MENTEE BENEFITS:

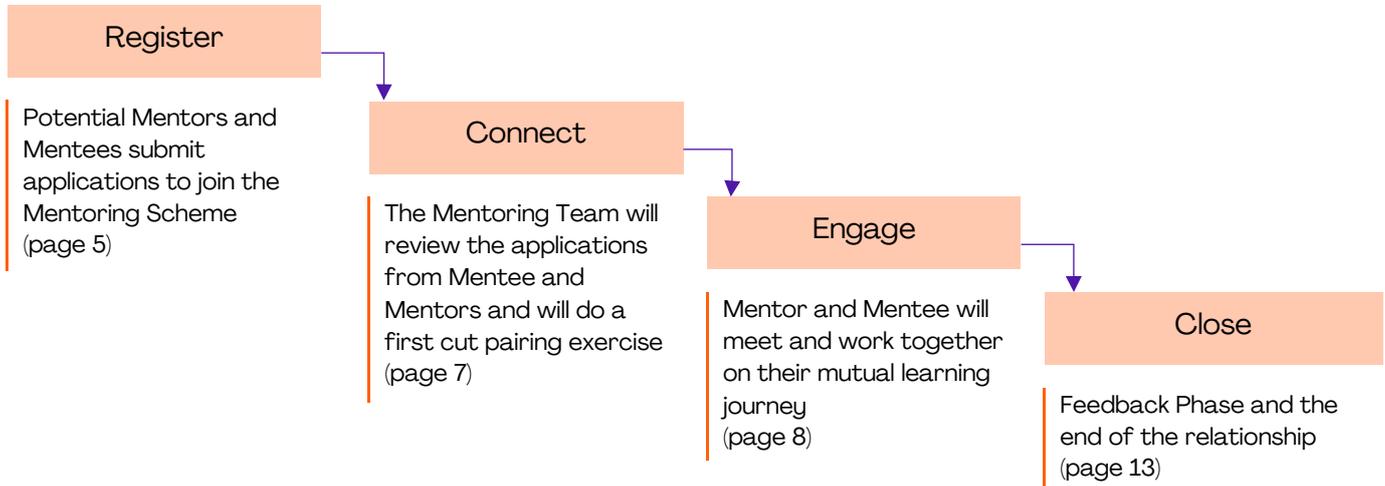
- Having someone independent to talk openly with
- Gain a wider perspective one's career and immediate tasks
- Time and help reflecting on new ways of thinking
- Access to knowledge and experience
- Improved confidence leading, coping with difficult situations, and resolving problems

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

The Mentoring Process

The mentoring process generally occurs over four stages as shown below. Over the next few pages, we shall explore each stage in-depth.

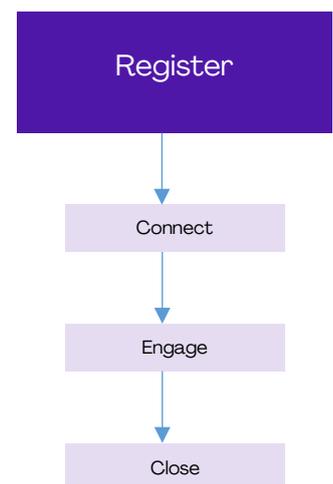


Stage 1: Register

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.



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. A suitable mentor:

- 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 a successful professional 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.

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. A suitable mentee:

- 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.

Behaviours

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



Stage 2: Connect Mentor and Mentee

Connect (matching) process

The Mentoring Team will review the applications from Mentee and Mentors and identify a good match.

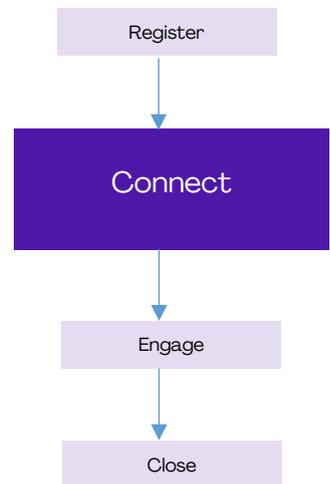
Where necessary, they will contact the candidates for more information. Mentors and Mentees will be matched according to geography, industry, and matching interests on the application form. LinkedIn introductions are sent out along with an introductory email that includes the profile information used in matching.

Participants are introduced by someone in the Mentoring team so that Mentors and Mentees can have a conversation to ensure they are happy with the pairing. This is also an opportunity for Mentor and Mentee to recognise the need to establish objectives and high-level plan for the Mentoring period. Mentors and Mentees are encouraged to attend 1-2 hours of training, which sets the expectations for how PMI UK's Mentoring activities are to be conducted.

Within the next week, Mentors and Mentees must confirm their formal relationship by completing the online Mentoring Agreement. The Mentor should organize the first meeting and set the goals for the future meetings.

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

As part of PMI's formal volunteer recognition system, applicants may be required to register via the Volunteer Relationship Management System (VRMS) located at <https://vrms.pmi.org/>. The Mentoring Team will advise further on this as applicable.



Stage 3: Engage

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

Responsibilities of the Mentor

The mentor should:

- Send out meeting request for the next session (or sessions if it helps to book these in advance). Remind the Mentee of the areas that you agreed to discuss and possibly any actions which the Mentor and/ or Mentee planned.
- Update the Mentoring team every 3 months to confirm that the relationship is still active and provide feedback to help improve the scheme
- Communicate with the Mentee, Mentor supervisor or Mentoring team, if at any time they feel that the relationship is running into trouble

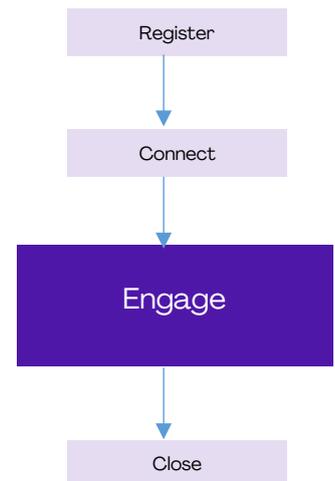
If you would like to claim PDUs, it is important that you record the key information about the session.

Responsibilities of the Mentee

The mentee should:

- Attend meetings as agreed with the Mentor and reflect on agenda topics to re-establish own priorities
- 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
- Communicate with the Mentor, Mentor supervisor or Mentoring team, if at any time they feel that the relationship is running into trouble

If you would like to claim PDUs, it is important that you record the key information about the session.



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. The following is a guide for planning ahead or recording session by session:

MENTORING PLAN		
Agenda topics	Session 1: Date:	Session 2 Date:
<Topic>	<Items discussed>	<Items discussed>
<Topic>	<Items discussed>	<Items discussed>

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 our programme participants to get the most out of mentoring and we are here to help you.

Hints and Tips for Effective Engagement

Be organised

As mentoring is often at 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 upfront helps to know when to say goodbye and to transition away from the Mentoring.
- Mentees should:
 - Take the initiative to propose the agenda and discussion topics based on goals.
 - 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 to create a foundation of resources and support, in addition to your Mentoring relationship

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.

Develop Trust

The following tips provide a solid foundation for the mentoring relationship:

- Maintain honest and open communication to ensure positive outcomes.
- Listen and consider alternatives that are offered.
- Build a strong trust relationship, where confidentiality is maintained.
- Ensure that the Mentor has no supervisory role with Mentee and or other conflict of interest.
- Establish rapport early and agree on goals, responsibilities, and expectations, to ensure the relationship gets off to a good start

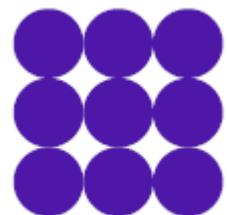
Mentors:

- 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 the Mentee 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.
- Consistently 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.

Mentees:

- Don't ask Mentor to do the work for you.
- Notify your Mentor of your concerns, problems and questions

Either the Mentor or Mentee can request reassignment without blame being assigned.



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 should have a similar background (or have a specific topic to discuss).

Mentors:

- 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 the Mentee's programme 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
- Mentors should be willing to stretch themselves to help the Mentees.

Mentees:

- Assume personal responsibility for your professional growth
- Accept constructive feedback willingly
- Be willing to take risks and be open to new ideas
- Main a 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 the Mentor as one who is suggesting alternatives
- Mentees should consider all ideas from their Mentor and together consider how appropriate they are for their situation.

Stage 4: Mentoring Close

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.

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.

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.

Support from the Mentoring Team

Still interested in being a Mentor or Mentee? Write notes to reflect what you now know about your mentoring goals and contact us as you boldly go to your next mentoring engagement!

Additional Resources for Mentoring

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)

More information on Mentoring

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-MenteeRelationships.aspx>

PMI Personal Development Units (PDUs)

Mentors

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 (January 2019):

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 25 PDUs (for the PMP/ PgMP/ PfMP/ PMI-PBA credentials) or 12 PDUs (for the PMI-ACP/ PMI-RMP/ PMI-SP credentials) allowed for the "Giving Back to the Profession" categories.

Documents required upon audit request: As a mentor, you would require a letter or certificate from the organization served acknowledging your participation. You can contact the Mentoring team to assist in this regard.

Mentees

It is possible for Mentees to claim PDUs; this is under Informal Learning which are individualized learning events involving personally conducted research/ study or structured discussion and interaction with others (CCR Handbook, 2019, page 12).

Documents required upon audit request: As a mentee, evidence supporting your reported learning, including notes from and dates of activities conducted.



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If you have any questions, comments, or would like
more information please contact:
mentoring@pmi.org.uk

