



WORKPLACE MENTORING WORKBOOK

[For more information about best practice in workplace mentoring, read through our guide here.](#)

<p>Your why</p> <p><i>What need will mentoring address at your company or agency?</i></p>																							
<p>Your internal champions</p> <p><i>Who should you and can you bring to the table to help you create or strengthen this potential mentoring program?</i></p>																							
<p>Your constraints and opportunities</p> <p><i>What boundaries exist and how can we prepare to overcome these ahead of planning?</i></p>	<table border="1"> <thead> <tr> <th data-bbox="358 1142 558 1297"></th> <th data-bbox="558 1142 857 1297">What constraints do you foresee?</th> <th data-bbox="857 1142 1183 1297">What opportunities do you have to make this work?</th> <th data-bbox="1183 1142 1547 1297">How can you leverage your opportunities to function within your constraints?</th> </tr> </thead> <tbody> <tr> <td data-bbox="358 1297 558 1476">People</td> <td data-bbox="558 1297 857 1476"><i>Eg shareholders not wanting to deviate from business plan</i></td> <td data-bbox="857 1297 1183 1476"><i>Eg Shareholders are responsive when presented with clear plans for how this will improve profits</i></td> <td data-bbox="1183 1297 1547 1476"><i>Eg come prepared with one pager clearly outlining pros/cons/what's needed at next board meeting. Present with shareholder champion.</i></td> </tr> <tr> <td data-bbox="358 1476 558 1549">Places</td> <td data-bbox="558 1476 857 1549"></td> <td data-bbox="857 1476 1183 1549"></td> <td data-bbox="1183 1476 1547 1549"></td> </tr> <tr> <td data-bbox="358 1549 558 1623">Funding</td> <td data-bbox="558 1549 857 1623"></td> <td data-bbox="857 1549 1183 1623"></td> <td data-bbox="1183 1549 1547 1623"></td> </tr> <tr> <td data-bbox="358 1623 558 1696">Knowledge</td> <td data-bbox="558 1623 857 1696"></td> <td data-bbox="857 1623 1183 1696"></td> <td data-bbox="1183 1623 1547 1696"></td> </tr> </tbody> </table>				What constraints do you foresee?	What opportunities do you have to make this work?	How can you leverage your opportunities to function within your constraints?	People	<i>Eg shareholders not wanting to deviate from business plan</i>	<i>Eg Shareholders are responsive when presented with clear plans for how this will improve profits</i>	<i>Eg come prepared with one pager clearly outlining pros/cons/what's needed at next board meeting. Present with shareholder champion.</i>	Places				Funding				Knowledge			
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<p><i>of the program itself.</i></p> <p><i>Considering your constraints and opportunities, what type of mentoring program is realistic for you?</i></p>		<ul style="list-style-type: none"> • <i>Team</i> • <i>Other?</i> 	
	<p>Investments</p> <p><i>What monetary and time investments are available for this project?</i></p>	<ul style="list-style-type: none"> • <i>Part of Professional Development \$</i> • <i>Part of hiring/onboarding cost</i> • <i>Designated funding for mentoring program</i> • <i>Partner funded</i> • <i>Funded through workforce grant</i> • <i>Volunteer/not funded</i> • <i>Other?</i> <p>-----</p> <ul style="list-style-type: none"> • <i>Participants compensated by company</i> • <i>Participants given time to participate during work</i> • <i>Volunteer participation only, no workday accommodations for participation</i> • <i>Other?</i> 	
	<p>Data Management</p> <p><i>Candidate information, Match progress notes, evaluations</i></p>	<ul style="list-style-type: none"> • <i>Managed by HR as part of normal scope of work</i> • <i>Managed by designated staff</i> • <i>Managed by external program partner (like a college or mentoring program)</i> • <i>Other?</i> 	
	<p>Staffing</p> <p><i>Who guides this work?</i></p>	<ul style="list-style-type: none"> • <i>HR</i> • <i>Company volunteers</i> • <i>External partner</i> • <i>Other?</i> 	

<p>Evaluation</p> <p><i>Your evaluation plan should be prepared to support your 'why' statement from page 1.</i></p>	<ul style="list-style-type: none"> • What does a successful program mean for your organization? (<i>Qualitative and quantitative data</i>) • Who decides what success looks like? Who should you invite to answer this question with you? • How will you capture data? • When/how will you reflect on your data? • What tools need to be created for this? (<i>logic model, KPIs, interview questions, etc</i>)
<p>Recruitment</p> <p><i>Recruitment done well saves time in monitoring and support of the match. Provide all of the information up front.</i></p>	<ul style="list-style-type: none"> • Who are your mentors? Why? • Who are your mentees? Why? • How will you spread the word? • What are the benefits to participation? • How will you message the time commitment and requirements of the program? • Who will oversee recruitment?
<p>Screening</p> <p><i>Screen in positive attributes as much as you screen out. Be realistic about who has the time and interest to participate.</i></p>	<ul style="list-style-type: none"> • Screening questions <ul style="list-style-type: none"> ○ Attitudes/beliefs ○ Commitment ○ Alignment with mission of program • What are red flags/automatic disqualifiers? • Process for accepting/rejecting • Point person for process
<p>Training</p> <p><i>Training on the program and attitudes and beliefs that lead to success create stronger community ties and</i></p>	<ul style="list-style-type: none"> • Who will design/deliver orientation to program (expectations, who to go to for help, what to do in case of emergency, cultural competence) • How often will you have additional training? On what topics?

<p><i>better program outcomes.</i></p>	
<p>Matching</p> <p><i>Take preferences and affinities into consideration. Celebrate the connection.</i></p>	<ul style="list-style-type: none"> • Criteria <ul style="list-style-type: none"> ○ Assigned ○ Chosen • Process <ul style="list-style-type: none"> ○ Formal match meeting ○ Match event ○ Email introduction ○ What should be shared with matches about each other and the process?
<p>Monitoring and support</p> <p><i>Monitoring and support takes time and effort – but can save relationships and time/energy at the end of the program!</i></p>	<ul style="list-style-type: none"> • Who will oversee matches? (<i>your staff, volunteers, external program?</i>) • What reporting is involved? Who will you share this with? • What happens if commitments are not honored? • How often will matches meet and for how long? (<i>eg 1x a month for a year</i>)
<p>Closing</p> <p><i>Endings are normal. A formal closing process provides positive boundary setting examples and helps protect all members of the mentoring experience.</i></p>	<ul style="list-style-type: none"> • When do participants know it's over? • How are participants prepared for ending ahead of time? • How can participants interact when it's over? • How will you celebrate success? • How will you close unsuccessful matches?