



# Mentoring Program Resource Directory

©2020, Healthcare Businesswomen's Association. All rights reserved.

---

[HBAnet.org](https://HBAnet.org)

Using This  
Directory

Key  
Documents for  
All Committee  
Members

Accessing  
Resources

## What is summarized in this directory? How should it be used?

This directory **identifies resources** provided by the HBA for use in organizing, planning, implementing and evaluating its regional mentoring programs. It lists forms, tools, complete slide decks and other materials **for Mentoring Program Committees as well as for program participants**—mentors, mentees and circles. These materials have been organized into 13 sections listed in the Table of Contents (slides 6-11).

Most resource names are followed by **(US)**, **(EU)** or **(US & EU)**, which indicate the mentoring program(s) for which they are designed. US = US/group mentoring programs; EU = HBA Europe 1:1 virtual program; and US & EU = may be used by both the US/group mentoring and EU/1:1 virtual mentoring programs.

**Mentoring Directors/Deputy Directors: Please share this directory and the following documents with all members of your mentoring program committee**, so everyone is aware of resources and procedures needed to accomplish the work:

- 01.01 - Committee Structure & Roles
- 01.03 - Mentoring Program Operations Manual

## How can I access copies of the actual resources?

All resources have been uploaded to the library of the “HBA Mentoring Program Leaders” group on the HBA Online Community, which mentoring directors and deputy directors can access 24/7. If you are a current mentoring director or deputy director of an HBA regional mentoring program and cannot access this group, please contact [mentoring@hbanet.org](mailto:mentoring@hbanet.org).

# Terms of Use

Free use of several resources in this guide has been granted by authors/developers who retain the copyright to their material; the copyright to other resources is held by the HBA.

- **Do not delete any copyright or credit lines** that appear in the footers or on individual pages or slides.
- All resources in this guide are **for use only within HBA regional mentoring programs and should not be used or distributed outside the HBA and its mentoring programs.**

If you have any questions about individual resources or their intended use, contact [mentoring@hbanet.org](mailto:mentoring@hbanet.org).

# Abbreviations

1:1 = mentoring program model where 1 mentor is paired with 1 mentee

COE = Center of Excellence

DD = Deputy Director

EU = Europe

F2F = Face-to-Face

MD = Mentoring Director

MPC = Mentoring Program Committee

OIC = Operations and Internal Communications (committee)

US = United States

# Table of Contents

*(continued on next page)*

Resources have been uploaded to the "Library" of the current "HBA Mentoring Program Leaders" group on the HBA Online Community.

## **00 - Mentoring Program Resource Directory** (this document) - **Key Resource**

### **01 - Committee Start-Up Resources**

- 01.01 - MENTORING PROGRAM COMMITTEE - Structure & Roles - **Key Resource**
- 01.02 - MENTORING PROGRAM COMMITTEE - Contact List Template
- 01.03 - Mentoring Program Operations Manual - **Key Resource**

### **02 - Program Set-Up Forms**

- 02.01 - SET-UP FORM - Group Mentoring Programs (US)
- 02.02 - SET-UP FORM - HBA Europe Mentoring Program (EU)
- 02.03 - SET-UP FORM - Mentoring Program-Related Events (US & EU)

### **03 - Marketing & Promotion**

- 03.01 - Social Media Slides
- 03.02 - Chapter Event Slides
- 03.03 - Promotional Email to Past Participants (US)
- 03.04 - Promotional Email to Past Participants (EU)
- 03.05 - INFORMATIONAL SESSION - Description (US)
- 03.06 - INFORMATIONAL SESSION - Email with Link (US)
- 03.07 - INFORMATIONAL SESSION - Slides (US)

# Table of Contents

*(continued on next page)*

## **04 - Application Surveys**

- 04.01 - Mentee Application Survey (US)
- 04.02 - Mentor Application Survey (US)
- 04.03 - Mentee Application Survey (EU)
- 04.04 - Mentor Application Survey (EU)
- 04.05 - Email Reminder to Complete Mentee Application (US & EU)
- 04.06 - Email Reminder to Complete Mentor Application (US & EU)

## **05 - Application Review & Notifications**

- 05.01 - Match Process, Principles, Tips (US)
- 05.02 - ACCEPTANCE NOTICE - Mentee (US)
- 05.03 - ACCEPTANCE NOTICE - Mentor (US)
- 05.04 - ACCEPTANCE NOTICE - Mentee (EU)
- 05.05 - ACCEPTANCE NOTICE - Mentor (EU)
- 05.06 - NONACCEPTANCE NOTICE - Mentee (US)
- 05.07 - NONACCEPTANCE NOTICE - Mentor (US)
- 05.08 - NONACCEPTANCE NOTICE - Mentee (EU)
- 05.09 - NONACCEPTANCE NOTICE - Mentor (EU)

# Table of Contents

*(continued on next page)*

## **06 - Pre-Kickoff Preparation & Instructions** (for New Virtual Kickoff Model)

- 06.01 - NEW VIRTUAL KICKOFF MODEL - First Email to Co-Mentors (US)
- 06.02 - NEW VIRTUAL KICKOFF MODEL - Second Email to Co-Mentors (US)

## **07 - Mentor Training**

- 07.01 - MENTOR WEBINAR - Email with Registration Link (US & EU)
- 07.02 - MENTOR WEBINAR - Email Reminder to Register (US & EU)
- 07.03 - MENTOR WEBINAR & FACE-TO-FACE MEETING - Slides (US)
- 07.04 - MENTOR WEBINAR - Slides (EU)
- 07.05 - MENTOR WEBINAR - Email with Link to Recorded Webinar (US & EU)

## **08 - Mentee Orientation Webinar**

- 08.01 - MENTEE WEBINAR - Email with Registration Link (US & EU)
- 08.02 - MENTEE WEBINAR - Email Reminder to Register (US & EU)
- 08.03 - MENTEE WEBINAR - Slides (US)
- 08.04 - MENTEE WEBINAR - Slides (EU)
- 08.05 - MENTEE WEBINAR - Email with Link to Recorded Webinar (US & EU)

# Table of Contents

*(continued on next page)*

## **09 - Kickoff Event**

- 09.01 - KICKOFF WEBINAR - Email with Registration Link (US & EU)
- 09.02 - KICKOFF WEBINAR - Email Reminder to Register (US & EU)
- 09.03 - FACE-TO-FACE KICKOFF - Final Reminder & Meeting Confirmation (US)
- 09.04 - KICKOFF WEBINAR - Slides (US)
- 09.05 - KICKOFF WEBINAR - Slides (EU)
- 09.06 - FACE-TO-FACE KICKOFF MEETING - Slides (US)
- 09.07 - Vision Board Activity for Face-to-Face Kickoff (US)

## **10 - Connector Training**

- 10.01 - Connector Training Slides



# Table of Contents

*(continued on next page)*

## **11 - Forms & Tools - Mentees, Mentors, Circles**

- 11.01 - Team Agreement (US-Circles)
- 11.02 - Team Charter Checklist (US-Circles)
- 11.03 - Two-Party Mentoring Agreement (EU-Tandems)
- 11.04 - About SMART Goals (Mentees)
- 11.05 - Development Plan (Mentees)
- 11.06 - Mentee Outcomes Form (Mentees)
- 11.07 - Mentee Journal (Mentees)
- 11.08 - Mentor Journal (Mentors)
- 11.09 - Team Tracking Form (US-Mentors)
- 11.10 - Topics & Books (All)
- 11.11 - HBA Leadership Competency Framework (All)

# Table of Contents

## **12 - Final Surveys**

- 12.01 - Email with Link to Final Mentee Survey (US & EU)
- 12.02 - Email with Link to Final Mentor Survey (US & EU)
- 12.03 - Email Reminder to Complete Final Mentee Survey (US & EU)
- 12.04 - Email Reminder to Complete Final Mentor Survey (US & EU)
- 12.05 - Final Mentee Survey (US)
- 12.06 - Final Mentor Survey (US)
- 12.07 - Final Mentee Survey (EU)
- 12.08 - Final Mentor Survey (EU)

## **13 - Closing Celebration**

- 13.01 - CLOSING WEBINAR - Email with Registration Link (US & EU)
- 13.02 - CLOSING WEBINAR - Email Reminder to Register (US & EU)
- 13.03 - FACE-TO-FACE CLOSING - Final Reminder & Meeting Confirmation (US)
- 13.04 - CLOSING WEBINAR - Slides (US)
- 13.05 - CLOSING WEBINAR - Slides (EU)
- 13.06 - FACE-TO-FACE CLOSING MEETING - Slides (US)
- 13.07 - CERTIFICATES - Mentee, Mentor, Committee (US)
- 13.08 - CERTIFICATES - Mentee, Mentor, Committee (EU)



# The Resources

# Section 01

## Committee Start-Up Resources

- **Describes regional mentoring program leadership, committee structure & roles.**

- **Provides reporting structure**

- **Indicates the term & timing of the work.**

Section 01

Committee  
Start-Up  
Resources

- Emails the completed list to Mentoring Director, Deputy Director & all Mentoring Program Committee members
- Sends a copy to Lori Whitehand at: [lwhitehand@hbanet.org](mailto:lwhitehand@hbanet.org)
- Updates & redistributes list, as necessary

[illegible]

# 01.03 - Mentoring Program Operations Manual

**Key Resource**  
Provide to all  
Mentoring Program  
Committee Chairs &  
members.

## Section 01

# Committee Start-Up Resources

**Mentoring Program Operations Manual**  
Key Program Activities, Actions & Suggested Timeframes\*  
November 2018

Sample Timeline Based on Late April/Early May Kickoff

\*Based on a late April/early May kickoff date; adjust schedule based on your kickoff date.

Sample Schedule & General Timeframes*	Activity	Tips, Hints, Reminders	Resources (Available in the "HBA Mentoring Program Leaders" group)
<b>Month of March</b> (~4-6 weeks prior to Kickoff)	<b>Match Process</b> <ul style="list-style-type: none"><li>Match Committee does final check for any missing Mentee and Mentor Applications; sends final reminders for immediate completion of any outstanding applications.</li><li>Match Committee contacts HBA Central's Lori Whitehand (<a href="mailto:lwhitehand@hbanet.org">lwhitehand@hbanet.org</a>) to close Mentee and Mentor Applications on SurveyMonkey.</li><li>Match Committee reviews mentee and mentor application information. Using match criteria (05.01), committee:<ul style="list-style-type: none"><li>Creates co-mentor pairs</li><li>Creates mentee groups of 4-5</li><li>Combines mentor pairs with mentee groups</li></ul></li><li>Match Chair reviews proposed mentoring group composition with MD prior to finalizing.</li><li>Match Committee sends out Mentee and Mentor acceptance emails using the mentoring program email account. (05.02, 05.03, 05.04, 05.05)<ul style="list-style-type: none"><li>Per acceptance email, those offered a place in the program are asked to immediately confirm their participation by return email.</li></ul></li><li>Match Committee tweaks mentoring group composition, as needed, to deal with business conflicts, personal issues, decisions not to participate.</li><li>Match Chair prepares final list of mentees and mentors who will not be participating in the program (ie, nonacceptances AND those who were accepted into the program but decided not to participate); reviews w/MD.<ul style="list-style-type: none"><li>Sends out nonacceptance notifications (05.06, 05.07, 05.08, 05.09) to mentees and mentors those who could not be placed in a group.</li><li>Prepares a list of any Mentee Program Fee refunds needed (ie, mentees who could not be placed in a group AS WELL AS mentees who decided not to participate in the program and notified the committee by the deadline). Sends one list with all refund requests to HBA Central event administration (<a href="mailto:events@hbanet.org">events@hbanet.org</a>) for processing. Note: Refunds may take several weeks to process/post.</li></ul></li><li>Match Committee ensures mentees and mentors who have been accepted into the program and decided to participate are current HBA members or join HBA prior to the Kickoff; follows up with those who aren't members to make sure they join.</li></ul>	<ul style="list-style-type: none"><li>Be ready to reconfigure groups if business/other conflicts surface. This can happen up until the Kickoff (although by sharing the names of group members with each circle early on, late surprises can be minimized).</li><li>It can be VERY helpful to have several individuals who are willing to be "on-call/stand by" mentors (ie, can jump in to serve, if needed, at the last minute). These individuals may come from the Mentoring Program Committee, Regional/Chapter Boards or past Mentor pool.</li></ul>	<ul style="list-style-type: none"><li>Always check 00.00 - Mentoring Program Resource Directory for instructions/tips on using resources listed below:</li><li>05.01 - Match Process, Principles, Tips</li><li>05.02 - Acceptance Notice - Mentee (US)</li><li>05.03 - Acceptance Notice - Mentor (US)</li><li>05.04 - Acceptance Notice - Mentee (EU)</li><li>05.05 - Acceptance Notice - Mentor (EU)</li><li>05.06 - Nonacceptance Notice - Mentee (US)</li><li>05.07 - Nonacceptance Notice - Mentor (US)</li><li>05.08 - Nonacceptance Notice - Mentee (EU)</li><li>05.09 - Nonacceptance Notice - Mentor (EU)</li></ul>

**21-page guide to activities, actions & resources for planning, implementing & evaluating HBA mentoring programs.**

- Organized chronologically
- Details specific actions to be taken by mentoring program leadership & committees
- Provide recommended timeframes for each activity
- Highlights key collaboration points with regional Centers of Excellence.
- Identifies mentoring program resources & how to use them.

## 02.01 - SET-UP FORM - Group Mentoring Programs (US)

### Section 02

## Program Set-Up Forms

**HBA** Group Mentoring Program:  
Set-Up Form  
V.11162018

- This form is used to set-up and open the registration/application process for the program itself. To set up registration for specific mentoring program events (eg, Mentor Training, Mentee Orientation, Program Kickoff, Closing Celebration, etc), use the short form for Mentoring Program-Related Events.
- Submit this fully completed form at least 16 weeks prior to the Program Kickoff date to ensure adequate time for audience recruitment, matching/notification and mentor/mentee training.
- Fields/drop-down menus requiring responses are highlighted in "yellow" and appear on every page of this form.
- Information/directions/tips for filling out this form appear in "red."

Send completed form to [events@hbanet.org](mailto:events@hbanet.org)

Completed form submitted by (name) [ ] on (date) [ ]

Region: Please select one [ ]

Regional Mentoring Program Committee contact for mentoring program registration/application process:  
Name: [ ] Email: [ ] Phone: [ ]

Who reviewed/approved the information provided in this form? Please select one [ ]

Primary competency: 12. Continues to learn, grow and transform [ ]

Secondary competency: 5. Determined to achieve [ ]

**INTERNAL PROGRAM TIMELINE - Must be fully completed as part of this form; will be reviewed by HBA.**  
Items in "blue" will be listed in the "Program activities" section. Consult the Mentoring Program Roadmap to ensure you have provided sufficient time for each step. Dates for all VIRTUAL events must have been reserved/confirmed with HBA Staff (since HBA staff will provide technical support).

- Registration closes (date): [ ]
- Last day that Mentees may withdraw from the program and still obtain a refund: [HBA event set-up staff will automatically set this to one week after the registration close date.]
- Matching begins (date): [ ]
- Matching complete (date): [ ]
- Program acceptances sent (date): [ ]
- Program nonacceptances sent (date): [ ]
- Co-mentor/Mentoring Group notifications/instructions sent (date): [ ]
- **Mentor Training** (one session required; additional blank provided for programs that will conduct two)
  - Mentor Training #1 - will be held Please select one on this date: [ ]
  - Mentor Training #2 - will be held Please select one on this date: [ ]
- **Mentee Orientation Webinar** (required) - date: [ ]
- **Program Kickoff** (one session required; additional blank provided for programs that will conduct two)
  - Kickoff #1 - will be held Please select one on this date [ ] from (start time) [ ] to (end time) [ ]
  - Kickoff #2 - will be held Please select one on this date [ ] from (start time) [ ] to (end time) [ ]

Page 1 of 7

- Submit 16 weeks prior to Kickoff date (so there is adequate time to promote program & recruit mentees & mentors as well as to complete the match process, issue acceptances/nonacceptances, train/orient mentors & mentees, etc).
- Both the Mentee Application Survey & Mentor Application Survey must be customized, finalized & tested to open registration. Links to each required in set-up form.
- Kickoff date needed to open registration (& also for the application surveys).
- Allow 5 full business days from submission of fully completed form to opening of registration (for program set-up, creation/testing of workflow emails, etc).



## 02.02 - SET-UP FORM - HBA Europe Mentoring Program (EU)

### Section 02

## Program Set-Up Forms

**HBA** HBA Europe Mentoring Program:  
Set-Up Form  
V.11162018

- This form is used to set-up and open the registration/application process for the program itself. To set up registration for specific mentoring program events (eg. Mentor Training, Mentee Orientation, Program Kickoff, Closing Celebration, etc), use the short form for Mentoring Program-Related Events.
- Submit this fully completed form at least 16 weeks prior to the Program Kickoff date to ensure adequate time for audience recruitment, matching/notification and mentor/mentee training.
- Fields/drop-down menus requiring responses are highlighted in "yellow" and appear on every page of this form.
- Information/directions/tips for filling out this form appear in "red."

Send completed form to [events@hbanet.org](mailto:events@hbanet.org)

Completed form submitted by Name: [ ] Email: [ ] Phone: [ ] on (date): [ ]

Region: Europe

Mentoring Program Committee contact for mentoring program registration/application process:  
Name: [ ] Email: [ ] Phone: [ ]

Who reviewed/approved the information provided in this form? Please select one

Primary competency: 12. Continues to learn, grow and transform

Secondary competency: 5. Determined to achieve

**INTERNAL PROGRAM TIMELINE - Must be fully completed as part of this form; will be reviewed by HBA.**  
Items in "blue" will be listed in the "Program activities" section. Consult the Regional Mentoring Program Roadmap to ensure that you have provided sufficient time for each step. Dates for all VIRTUAL events must have been reserved/confirmed with HBA Staff (since HBA staff will provide technical support).

- Registration closes (date): [ ]
- Last day that Mentees may withdraw from the program and still obtain a refund: [HBA event set-up staff will automatically set this to one week after the registration close date.]
- Matching begins (date): [ ]
- Matching complete (date): [ ]
- Program acceptances sent (date): [ ]
- Program nonacceptances sent (date): [ ]
- Mentor/Mentee notifications/instructions sent (date): [ ]
- Mentor Training (one session required; additional blanks provided if more than one session will be conducted)
  - Mentor Training #1 - will be held Please select one on this date: [ ]
  - Mentor Training #2 - will be held Please select one on this date: [ ]
  - Mentor Training #2 - will be held Please select one on this date: [ ]
- Mentee Orientation webinar (date): [ ]
- Kickoff webinar (date): [ ]

Page 1 of 6

- Submit 16 weeks prior to Kickoff date (so there is adequate time to promote program & recruit mentees & mentors as well as to complete the match process, issue acceptances/nonacceptances, train/orient mentors & mentees, etc).
- Both the Mentee Application Survey & Mentor Application Survey must be customized, finalized & tested to open registration. Links to each required in set-up form.
- Kickoff date needed to open registration (& also for the application surveys).
- Allow 5 full business days from submission of fully completed form to opening of registration (for program set-up, creation/testing of workflow emails, etc).



## 02.03 - SET-UP FORM - Mentoring Program-Related Events (US & EU)

### Section 02

## Program Set-Up Forms



### Mentoring Program-Related Events: Set-Up Form

V.11162018

- **This form is used to set-up registration for mentoring program events** (eg, Mentor Training, Mentee Orientation, Kickoff, Closing Celebration). It is assumed that there is "no charge" for all events set up using this form.
- **For all VIRTUAL events (webinars) - The event date must be reserved/confirmed in advance with HBA Staff** before the event can be listed on the Mentoring Program registration page. Webinars will be conducted on the GoToWebinar platform with HBA Staff providing technical support for educational program components conducted virtually.
- **For IN-PERSON/F2F events for which you are requesting an additional registration be set up in ProTech** - Not required; some Committees prefer to collect registration RSVPs via email/Survey Monkey OR plan to use their mentoring program group in the HBA Online Community.
- **Submit this fully completed form at least 8 weeks prior to the event date.**
- Fields/drop-down menus requiring responses are highlighted in "yellow."
- Information/directions/tips for filling out this form appear in "red."

Send completed form to [events@hbanet.org](mailto:events@hbanet.org)

Completed form submitted to HBA by Name:  Email:  Phone:  on (date):   
Region:  Please select one  
Who reviewed/approved the information provided in this form?  Please select one

Page 1 of 6

- **Examples: Mentor Training, Mentee Orientation, Networking Socials, Kickoff, Closing Celebration**
- **Recommend setting up mentoring program-related events at least 8 weeks prior to event date.**

## 03.01 - Social Media Slides

### Section 03

# Marketing & Promotion



**Reach out to your region's Marketing Center of Excellence (COE) President to have social media slides developed for your program.**

## 03.02 - Chapter Event Slides

### Section 03

# Marketing & Promotion

**Reach out to your region's Marketing Center of Excellence (COE) President to develop one or more slides that can be shown at chapter/regional events to promote the mentoring program.**

- Start this process early: It takes time for your fellow volunteers to prepare these materials.
- Again, work ahead: Ensure these slides reach the right individuals at the local/regional level so they can be incorporated into the Opening Remarks (& the presenter's slides) at these events.
- Make sure these slides are available in advance of when registration opens for the mentoring program. Ask that these slides be displayed at all chapter/regional events before & throughout the open registration period.

## 03.03 - Promotional Email to Past Participants (US)

### Section 03

## Marketing & Promotion

#### 03.03 - Promo Email to Past Participants (US programs)

**Recommended Subject Line:**

Invitation to re-enroll in this year's mentoring program - Registration closes [date]

Dear Mentoring Colleague,

You know, first hand, how group mentoring can enrich professional development, accelerate career advancement and expand your leadership network. As a past participant in an HBA mentoring program, we are pleased to provide this special announcement and invitation to re-enroll in this year's program.

Registration is now open for the [year] HBA [region] Group Mentoring Program. [make underlined copy a link to the program registration page] which offers the following choice of locales for in-person meetings of mentoring groups:

- [City, State or other description]
- [City, State or other description]
- [City, State or other description]
- [City, State or other description]
- [City, State or other description]
- Depending on interest, a small number of virtual groups may be created

This program is only offered once a year, and registration will close on [registration close date] to accommodate Mentor Training [date], Mentee Orientation [date] and the Kickoff event [date].

Don't miss this opportunity to re-engage with a new circle of HBA members in this results-oriented program. **Register now!** [make underlined copy a link to the program registration page]

P.S. Please feel free to share this with others in your professional circle who you think could benefit from this experience.

Warm wishes,  
HBA [region] Regional Mentoring Program Committee

P.S. If you have questions about this program, please contact [Name] at [phone number] or email [mentoring program email address].

### Promotional email draft to past participants of an HBA Group Mentoring Program.

- Customize areas highlighted in "yellow" with your program's information & registration deadline.
- Pull the list of last year's mentoring program participants from ProTech (include mentees & mentors; delete cancellations). Note: Mentoring Director & Deputy Director have 24/7 access to ProTech reports.
- Send the list & the customized email to your region's Marketing Center of Excellence (COE) President, so they can work with HBA's Marketing Staff to send out from Informz.

## 03.04 - Promotional Email to Past Participants (EU)

### Section 03

## Marketing & Promotion

#### 03.04 - Promo Email to Past Participants (EU)

**Recommended Subject Line:**

Invitation to re-enroll in this year's mentoring program - Registration closes [date]

Dear Mentoring Colleague,

As a past participant in the HBA Europe Mentoring Program, you know how mentoring can enrich professional development, accelerate career advancement, and expand your leadership network. That's why we are pleased to provide this special invitation for you to re-engage in this year's program.

Registration is now open for the [year-year] HBA Europe Mentoring Program. [make underlined copy a link to the program registration page] which, as you know, pairs one mentor with one mentee who work together over the course of nine months to help achieve the mentee's goals. Most meetings take place virtually, since mentees and mentors may come from different countries or continents.

This program is only offered once a year, and registration will close on [registration close date] to accommodate the Mentor Training webinar [date], Mentee Orientation webinar [date] and the Kickoff webinar [date].

Don't miss this opportunity to reap the many benefits that a mentoring relationship can provide.

Register now! [make underlined copy a link to the program registration page]

P.S. Please feel free to share this with others in your professional network who you think could benefit from this experience.

Warm wishes,  
HBA Europe Mentoring Program Committee

P.S. If you have questions about this program, please contact [Name] at [phone number] or email [mentoring program email address].

### Promotional email draft to past participants of the HBA Europe 1:1 Mentoring Program.

- Customize areas highlighted in "yellow" with your program's information & registration deadline.
- Pull the list of last year's mentoring program participants from ProTech (include mentees & mentors; delete cancellations). Note: Mentoring Director & Deputy Director have 24/7 access to ProTech reports.
- Send the list & the customized email to your region's Marketing Center of Excellence (COE) President, so they can work with HBA's Marketing Staff to send out from Informz.

## 03.05 - INFORMATIONAL SESSION - Description (US)

### Section 03

# Marketing & Promotion

#### 03.05 - Informational Session-Group Mentoring Programs - Description (US)

Note: This virtual session is conducted by the Mentoring Program Committee on the GoToMeeting platform designated for Regions' use.

|

Learn more about the [year] HBA [Region] Group Mentoring Program:  
Free Informational Session

#### Date and time

[Day, Date]

[Time] - [Time & Time Zone]

#### Event contact

[Name and Phone and/or mentoring program email address]

Is [year] the year for you to harness the power of mentoring relationships to accomplish a career or leadership goal? Have you wondered how the HBA group mentoring program works and if there will be a mentoring circle forming in your local area? This free informational session will help answer key questions about this highly valued program and what it can do for you. Topics include:

- Why mentoring?
- Program structure and timeline
- What are mentoring circles and how do they work?
- Mentee/Mentor benefits
- How can I join?
- Registration/application deadline

Following the presentation, there will be a live Q&A session with members of the Mentoring Program Committee.

#### Registration information

This informational session is free; both HBA members and nonmembers may register.

#### Featured speaker

[Name]

[HBA Mentoring Title]

[Professional Title/Affiliation]

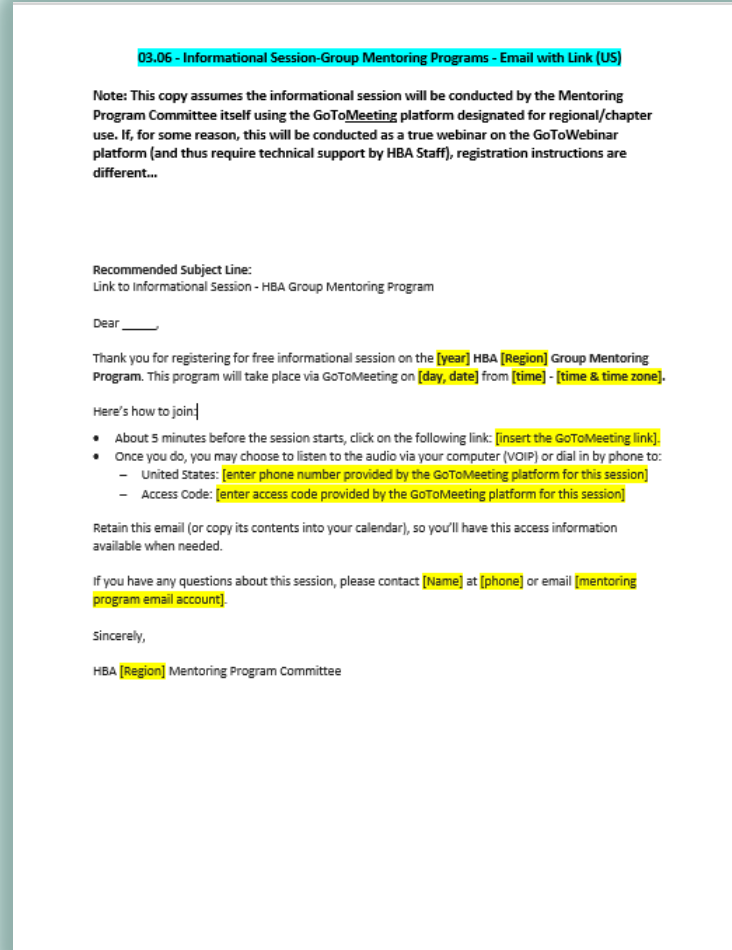
### Description of an informational session on the HBA Group Mentoring Program.

- Customize areas highlighted in "yellow" with your program's information.
- This virtual session is conducted by the Mentoring Program Committee itself on the GoToMeeting platform designated for Regional/Chapter use.

## 03.06 - INFORMATIONAL SESSION - Email with Link (US)

### Section 03

## Marketing & Promotion



**Email with link to an informational session conducted on the GoToMeeting platform managed by the Mentoring Program Committee.**

- Customize areas highlighted in "yellow" with your program's information & link/dial-in number from GoToMeeting.
- This copy assumes the informational session will be conducted by the Mentoring Program Committee itself using the GoToMeeting platform designated for regional/chapter use. If, for some reason, this will be conducted as a true webinar on the GoToWebinar platform (& thus require technical support by HBA Central Staff), registration instructions are different...

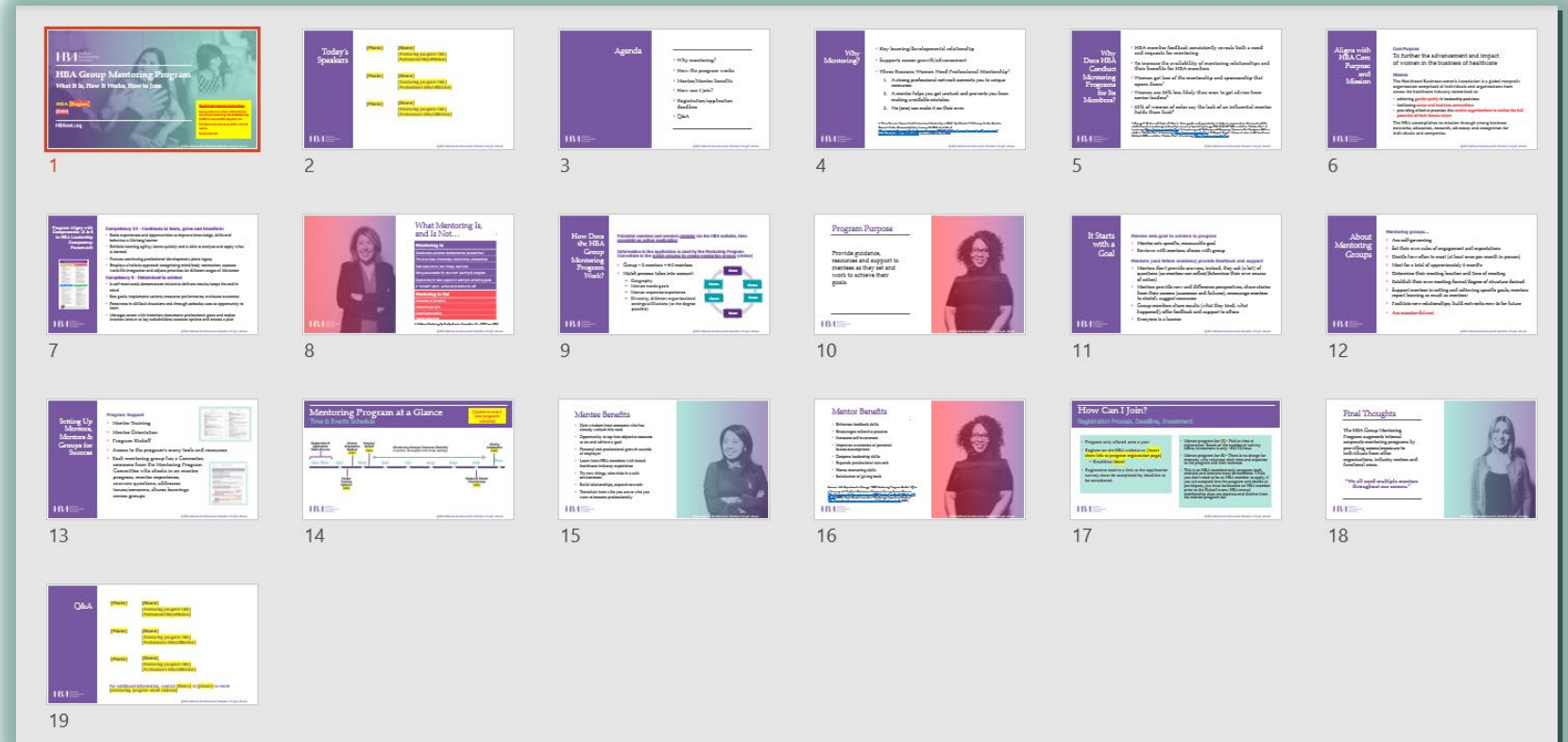
## 03.07 - INFORMATIONAL SESSION - Slides (US)

### Section 03

# Marketing & Promotion

### Complete slide deck (19 slides) for an informational session on HBA's Group Mentoring Program

- Customize highlighted areas with your program's information & registration deadline.
- Set-up & run a virtual informational session yourself using the GoTo**Meeting** platform designated for regional/chapter use.
- Slide deck may also be used for Lunch & Learn meetings.





## Section 04

# Application Surveys

### 04.01 - Mentee Application Survey (US) 04.02 - Mentor Application Survey (US)

#### **Survey Monkey has imposed limitations on account access -**

HBA is exploring how to manage these new restrictions. In the interim, contact HBA Central's Lori Whitehand ([lwhitehand@hbanet.org](mailto:lwhitehand@hbanet.org)) for assistance/support.

## Section 04

# Application Surveys

**04.03 - Mentee Application Survey (EU)**

**04.04 - Mentor Application Survey (EU)**

**Survey Monkey has imposed limitations on account access -**

HBA is exploring how to manage these new restrictions. In the interim, contact HBA Central's Lori Whitehand ([lwhitehand@hbanet.org](mailto:lwhitehand@hbanet.org)) for assistance/support.

## 04.05 - Email Reminder to Complete Mentee Application (US & EU)

## 04.06 - Email Reminder to Complete Mentor Application (US & EU)

### Section 04

# Application Surveys

#### 04.05 - Email Reminder to Complete Mentee Application (US & EU)

**Recommended Subject Line:**

Reminder - Complete your mentee application by [date] to be considered for the program

Dear Mentee Candidate,

To be considered for the HBA [Region] Mentoring Program, you must complete the Mentee Application by [date]. The information you provide in the survey will be used by the Mentoring Program Committee in the match process. Please complete this survey even if you were a Mentee in last year's program.

Click on this link to go to the application: [enter Mentee Application Survey link].

If you have questions about the application or the program, please contact [Name] at [phone number] or email [mentoring program email address].

Warm wishes,  
HBA [Region] Mentoring Program Committee

#### 04.06 - Email Reminder to Complete Mentor Application (US & EU)

**Recommended Subject Line:**

Reminder - Complete your mentor application by [date] to be considered for the program

Dear Prospective Mentor,

To be considered for the HBA [Region] Mentoring Program, you must complete the Mentor Application by [date]. The information you provide in the survey will be used by the Mentoring Program Committee in the match process. Please complete this survey even if you served as a Mentor last year.

Click on this link to go to the application: [enter Mentor Application Survey link].

If you have questions about the application or the program, please contact [Name] at [phone number] or email [mentoring program email address].

Warm wishes,  
HBA [Region] Mentoring Program Committee

# 05.01 - Match Process, Principles, Tips (US)

## Section 05

# Application Review & Notifications



### Match Process, Principles, Tips Prepared by Liz Stueck

#### US programs (in-person, group model)

1. Getting Started
  - Download data (in Excel format) from both the mentor and mentee application surveys, so information can be sorted and resorted on different variables.
  - Most programs create mentee groups and mentor pairs separately; sometimes different individuals from the Match Committee are assigned to each task. Once that's done, mentee groups are matched with mentor pairs.
  - Ideal group composition: 2 mentors paired with 4-5 mentees
2. Any Immediate Disqualifiers?
  - Can't make an in-person kickoff (if waived, Committee/Connector must be willing to help this individual make a quick connection to their group)
  - Can't commit to program expectations, time requirements, etc.
  - Mentor applicants without requisite experience (can you suggest they participate as a mentee first?)
3. Criteria
  - Since the HBA US mentoring model is based on in-person groups, the first or primary sort is **geography** (i.e., mentoring locales) to help facilitate in-person meetings.
    - While a small number of virtual groups *may* be offered, this is **not** the primary focus of the US regional program. Proposed virtual group members should be those who, for whatever reason, prefer/need a virtual setting (as vs those who accept this as much less preferred option).
  - Mentoring **area of focus** (mentees) with mentoring **area of expertise** (mentors)
  - What mentees **want to learn** (e.g., entrepreneurship) with reported mentor **experiences** (e.g., have started a company)
  - For co-mentors
    - **Diversity of organizational setting** (i.e., pair a professional coach or consultant with an industry leader; don't pair two coaches--or two consultants--together)
    - **Level of experience** - Pair a mentor who is new to the HBA program with one who has served before.
    - **Gender diversity** - If you have male mentors in your program, do not pair them together.

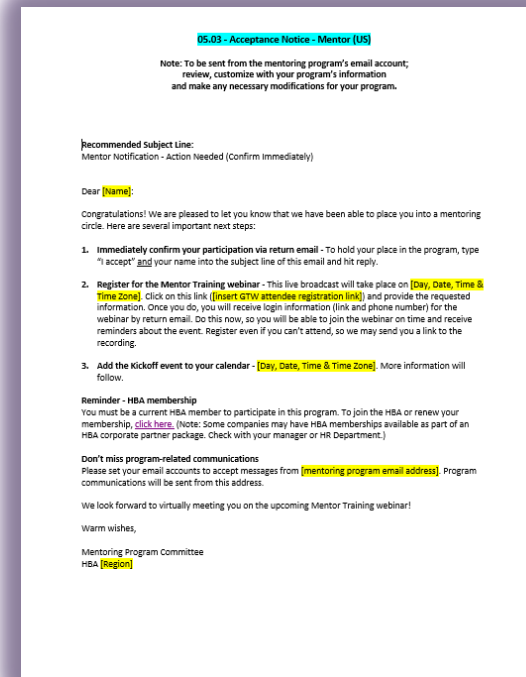
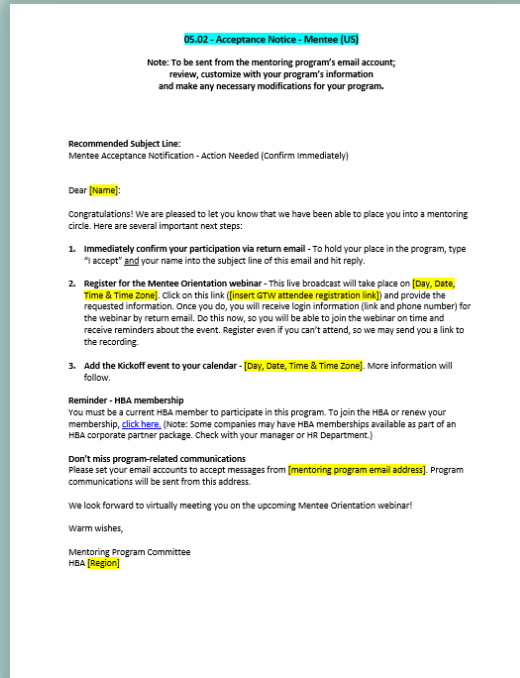
- For mentee groups
  - **Diversity in mentee functional areas** can provide new/different perspectives (as versus having all mentees come from one functional area) although sometimes mentees who have a similar area of focus (e.g., scientists who want to learn more about the commercial side) can benefit from being in the same group.
- 4. Other Considerations
  - To the extent possible, **avoid having individuals from the same company in a group together**. If that's not possible, try to ensure that the individuals come from different parts of the organization. Always check the acceptability of this with both individuals.
  - Check for **mentee comfort** (or ambivalence) with having a **male mentor**. If a mentee answers "no" or "not sure" in the survey, do not place her in a group with a male mentor. Likewise, is the mentee comfortable with having a **male mentee** in the circle?
- 5. Input & Review
  - Match Committee should review proposed circle make-up with other Mentoring Program Committee members who may have **personal knowledge of the individuals**--another reason why it's advantageous to have volunteers from across the region serve on the committee.
  - Match results should be reviewed with the **Mentoring Program Leadership** (Mentoring Director or Deputy Director) before being finalized.
  - When timing permits, it can be helpful to have **co-mentors preview** the list of proposed mentees in their group for any issues/conflicts, etc.
- 6. Issues & Adjustments
  - **Be prepared to make adjustments** - A mentor or mentee may decide NOT to participate or an issue unknown to the Committee may surface.
  - **Personal issues or potential conflicts of interest** (e.g., past manager/employee relationships that were problematic, industry/vendor relationships, etc.) may prompt a request for reassignment to another group. If this occurs, a Committee member should speak with the individual to ascertain the nature of the situation and determine if there is another group to which the individual can be switched. Having adequate time between notifications and the date of the kickoff can help get adjustments made early, ideally before group members first meet each other.
- 7. Tips & Best Practices
  - If possible, have a "**spare**" Mentor (or 2!) on tap; perhaps a "**spare**" Mentee, too. These individuals could be members of the Mentoring Program Committee...
  - **Don't start out with less than 4 Mentees in a circle**. (If there are only 3 mentees to start and one drops, the "group" format rapidly deteriorates.)
- 8. Resources
  - **February 2018 Mentoring Functional Call recording available at:**  
<https://attendee.gotowebinar.com/recording/4625974561617643522>

## 05.02 - ACCEPTANCE NOTICE - Mentee (US)

## 05.03 - ACCEPTANCE NOTICE - Mentor (US)

### Section 05

# Application Review & Notifications



### Acceptance Notices for Group Mentoring Programs (US)

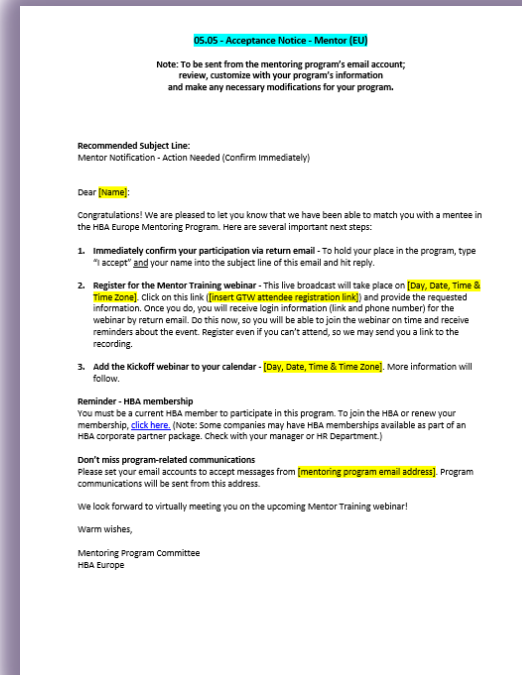
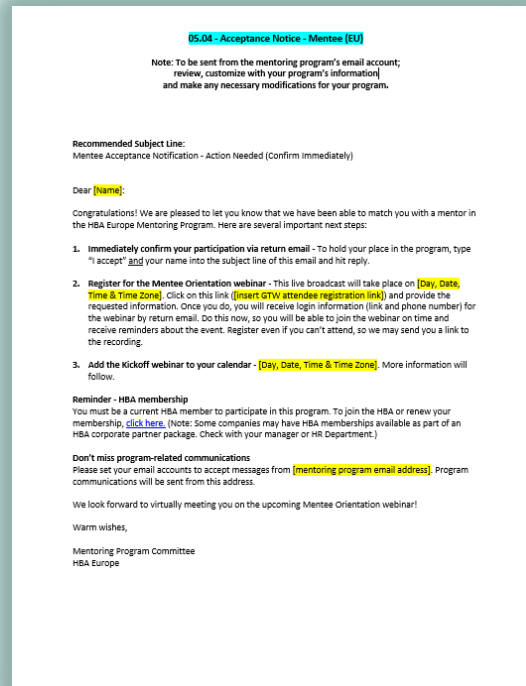
- Send from your mentoring program's email account.
- Review & customize with your program's information.
- Mentee notice includes invitation & link to register for the Mentee Orientation webinar.
- Mentor notice includes invitation & link to register for the Mentor Training webinar. If your program's Mentor Training session will be held as a Face-to-Face Meeting, please amend this language accordingly & include your meeting registration/RSVP link.
- Both notices ask participants to confirm their participation by return email.

## 05.04 - ACCEPTANCE NOTICE - Mentee (EU)

## 05.05 - ACCEPTANCE NOTICE - Mentor (EU)

### Section 05

# Application Review & Notifications



### Acceptance Notices for HBA Europe Mentoring Program (EU)

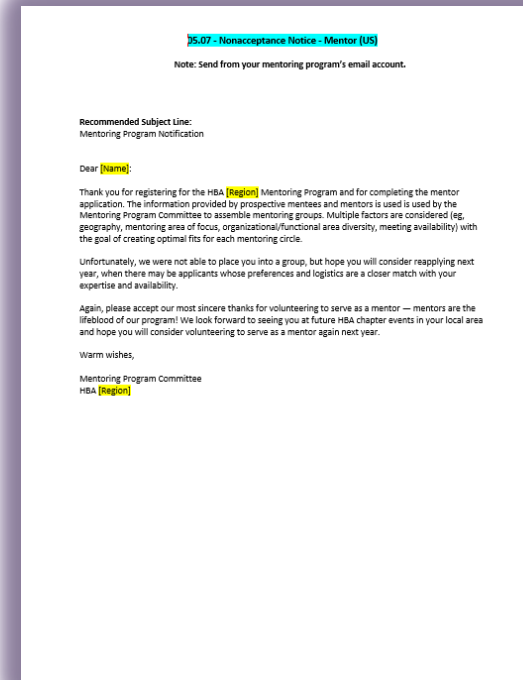
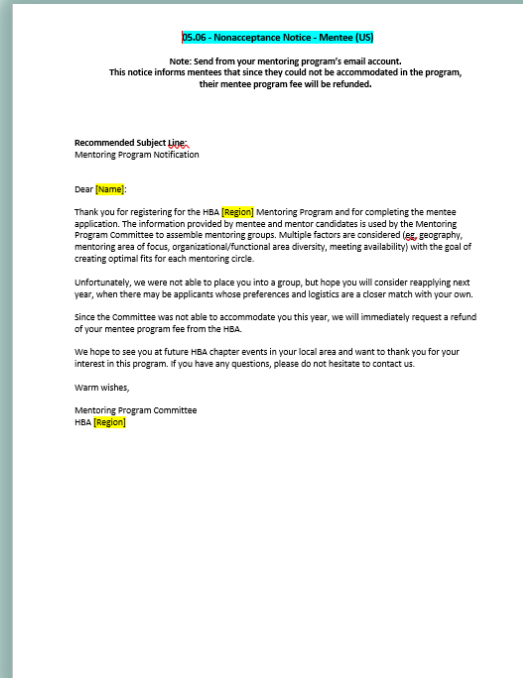
- Send from your mentoring program's email account.
- Review & customize with your program's information.
- Mentee notice includes invitation & link to register for the Mentee Orientation webinar.
- Mentor notice includes invitation & link to register for the Mentor Training webinar. If your program's Mentor Training session will be held as a Face-to-Face Meeting, please amend this language accordingly & include your meeting registration/RSVP link.
- Both notices ask participants to confirm their participation by return email.

## 05.06 - NONACCEPTANCE NOTICE - Mentee (US)

## 05.07 - NONACCEPTANCE NOTICE - Mentor (US)

### Section 05

# Application Review & Notifications



### Nonacceptance Notices for Group Mentoring Programs (US)

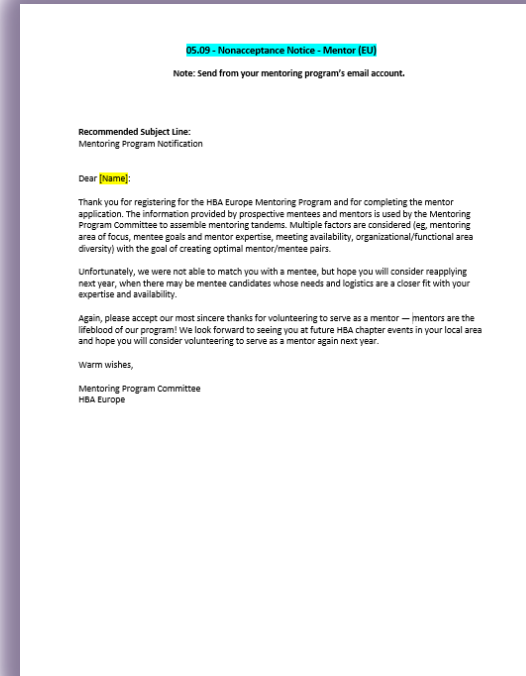
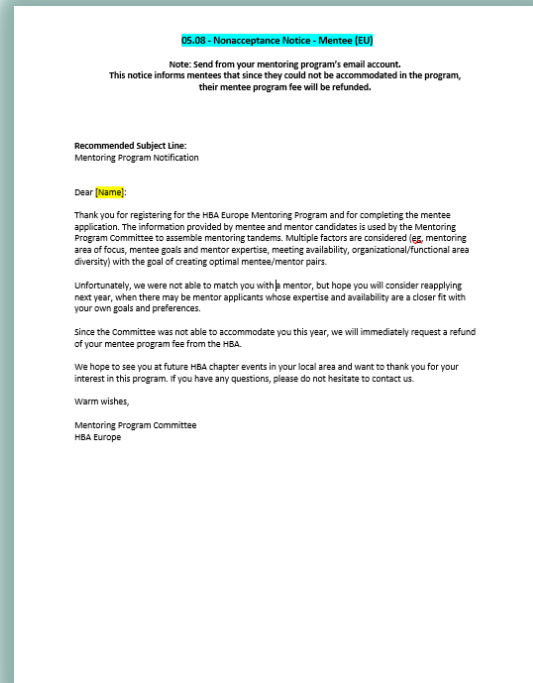
- Send from your mentoring program's email account.
- Review & customize with your program's information
- Mentee notice informs mentees that since they could not be accommodated in the program, their mentee program fee will be refunded.

## 05.08 - NONACCEPTANCE NOTICE - Mentee (EU)

## 05.09 - NONACCEPTANCE NOTICE - Mentor (EU)

### Section 05

# Application Review & Notifications



### Nonacceptance Notices for HBA Europe Mentoring Program (EU)

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Mentee notice informs mentees that since they could not be accommodated in the program, their mentee program fee will be refunded.



Section 06

Pre-Kickoff  
Preparation &  
Instructions

06.01 - NEW VIRTUAL KICKOFF MODEL - First Email to Co-Mentors (US)

For New Virtual Kickoff Model - First Email to Co-Mentors (US)

- Send from your mentoring program's email account
- Customize with your program's information, dates, links
- OIC adds contact information for all members of the of the mentoring group in the table.
- Outlines key actions for co-mentors to take
- Includes reminder to register for the Mentor Training webinar
- Provides link to register for the Kickoff webinar
- Includes a draft email for co-mentors to send to their mentees (after signature line)

**06.01 - Virtual Kickoff - First Email to Co-Mentors**

Send from your mentoring program's email account;  
Customize with your program's information, dates, links;  
provide contact information for all members of the group in the table;  
outlines key actions for co-mentors to take;  
includes reminder to register for the Mentor Training webinar;  
provides link to register for the Kickoff webinar;  
and includes a draft email for Co-Mentors to send to their mentees;

**Recommended Subject Line**  
Action Needed: Co-mentor Introductions & email to mentees

Dear [First Name] and [First Name],

Thank you for volunteering to serve as mentors in the HBA [Region] Group Mentoring Program! We are excited to let you know that the two of you have been paired together to co-mentor a mentoring circle whose meetings will be held in/around the following locale: [locale].

**IMPORTANT & TIME SENSITIVE - Immediate Next Steps:**

1. Please reach out to your co-mentor to introduce yourselves and get the conversation started!
2. Quickly reach out to your mentees (contact information below) to welcome them to the program and to introduce yourselves. **A draft email is provided below for your convenience.**
3. You and your co-mentor should identify a place for your group to meet for the Kickoff event. Here is important background on Kickoff meeting format and technical requirements.
  - The Kickoff Event will take place on [day, date], and your circle will meet together in person at [time & time zone] at the location the mentors provide. After having time to for the group to get acquainted, one of the mentors will login to the Kickoff Webinar and the group will watch it together. Once the webinar ends, the group will continue to meet for another 60-75 minutes to complete a group mentoring agreement, develop a team charter and set the schedule for future meetings of the mentoring group.
  - The meeting location should be a quiet place with wifi access. A conference room at an office or other similar location is optimal; the meeting should not be held in a restaurant.
4. Once you've identified your meeting location, let your mentees know where and when you'll meet for the Kickoff. Please do this well in advance of the Kickoff.

**Mentor Training Webinar:** If you haven't already done so, please register for the Mentor Training Webinar, which will take place on [day, date, time & time zone] by clicking on this link: [Attendee Link to Mentor Training Webinar]. There are important innovations to this year's program that will be explained during this webinar, so please make every effort to attend the live broadcast, which will include the opportunity to ask questions. Both co-mentors should participate. Note: The webinar will be recorded for those who can't make the live session.

**Register for the Kickoff webinar:** You or your co-mentor (or both of you -- always good to have a backup!) should register for the Kickoff webinar by clicking on this link: [Attendee Link to Kickoff webinar].

Your Mentoring Group - below are the members of your circle with their contact information. All mentees have received an email invitation to the Mentee Orientation Webinar on [day, date]. They will NOT learn who is in their group during that session. The first communication about who they have been matched with comes directly from YOU, the Co-Mentors.

Role	Name	Company	Email	Phone
Mentor 1				
Mentor 2				
Mentee 1				
Mentee 2				
Mentee 3				
Mentee 4				
Mentee 5				

If you have any immediate questions or concerns, please reach out to [mentoring program email address].

Again, thank you for volunteering to serve as mentors, and we look forward to speaking with you on the Mentor Training Webinar on [date].

Warm wishes,

Mentoring Program Committee  
HBA [Region]

((DRAFT EMAIL: Co-Mentors send to Mentees))

Hello [Mentee name],

Welcome to the HBA [Region] Group Mentoring Program and to our Mentoring Circle! [Mentor name] and I are looking forward to meeting you at the Kickoff Event on [day, date]. Our group will meet together in person at [provide meeting location/address, if now known, otherwise, indicate that you will provide this shortly] at [time & time zone] sharp.

Following your participation in the Mentee Orientation webinar on [date], you should have a good understanding of how the program works. As your mentors, we are committed to providing a safe and supportive environment for you to set and make progress toward achieving your goals. From us you can expect honest, candid feedback as well as advice and the direction to help you find your own solutions. We ask that you show up eager and willing to fully participate.

During the Kickoff event, we will get to know one another, discuss expectations for how we'll engage, the format of our meetings and set meeting dates/times (bring your calendars). It's important you spend

some time in advance to reflect on your goals and have a clear understanding of what you'd like to gain from this experience.

If you have any questions or need additional information at this point, please don't hesitate to call, text, or email. More to come...

Look forward to seeing you soon,  
[Mentor name]  
[Mentor name]

Notes:

1. Make sure you understand how this model works - More information in the Mentoring Program Operations Manual (01.03).
2. The instructions provided to co-mentors AND co-mentor reliability in sending these communications on time to their mentees is critical to a having a successful kickoff.

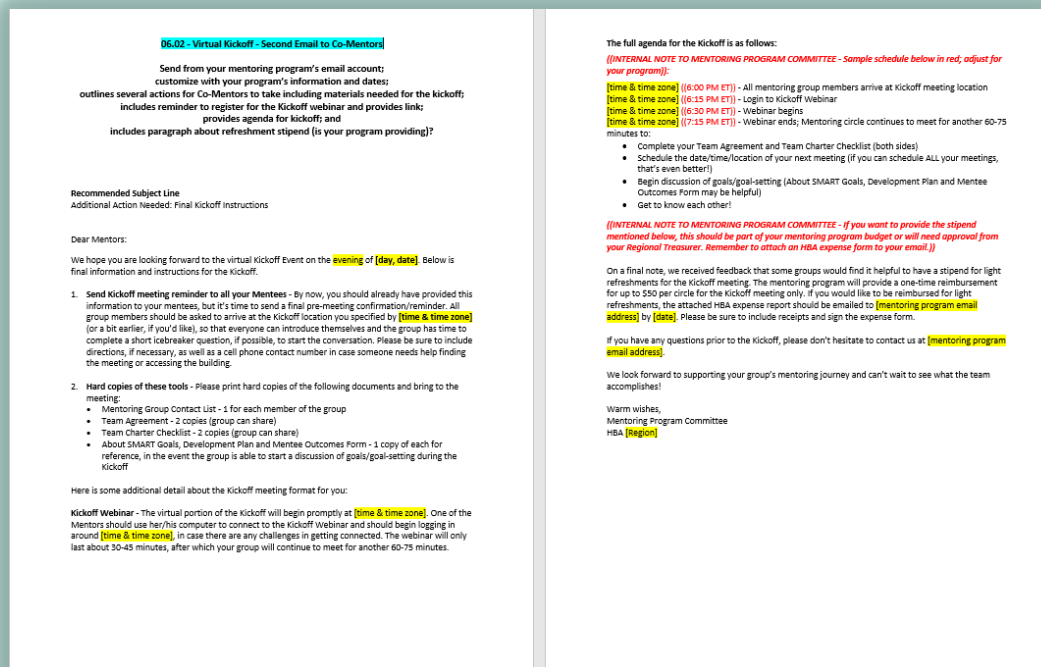
## 06.02 - NEW VIRTUAL KICKOFF MODEL - Second Email to Co-Mentors (US)

### Section 06

# Pre-Kickoff Preparation & Instructions

### For New Virtual Kickoff Model - Second Email to Co-Mentors (US)

- Send from your mentoring program's email account
- Customize with your program's information, dates, links
- Email summarizes several actions for co-mentors to take & includes materials they should bring to the kickoff; includes a reminder to register for the Kickoff webinar & provides the link to it
- Provides agenda for the kickoff
- There is a paragraph describing a **refreshment stipend** - is your program providing? (Should be part of your mentoring program budget or will need approval from your Regional Treasurer.)



## 07.01 - MENTOR WEBINAR - Email with Registration Link (US & EU)

### Section 07

# Mentor Training

#### 07.01 - Mentor Training Webinar - Email with Registration Link (US & EU)

**Recommended Subject Line:**

Register now for Mentor Training webinar on [date]

Dear Mentors,

Welcome to Mentor Training for the [year] HBA [Region] Mentoring Programs!

Our **Mentor Training webinar** will be held on [day, date] from [time]-[time & time zone]. We look forward to having you join this live broadcast, which will provide an overview of the program, describe mentor/mentee roles, responsibilities and best practices, and help you prepare for the upcoming kickoff event. Ample time will also be provided for a Q&A session with the Mentoring Program Committee.

This session will be held as a webinar and you **must register for it by clicking on this link** [insert **Attendee link to the Mentor Training webinar**] and providing the requested information. Once you do, you will receive your personal webinar access information (link and phone number) by return email. Register now, so you'll be ready to login to the program and receive reminders about this event from the HBA Education Department webinar platform.

Both new and returning mentors should attend this required training, as several important changes and innovations have been made to this year's program. Everyone is encouraged to attend the live broadcast; however, the webinar will be recorded for those with scheduling conflicts.

Again, thank you for volunteering to serve as a mentor; we look forward to connecting with you during this virtual session on [date].

Warm wishes,

Mentoring Program Committee  
HBA [Region]

### For Mentor Training webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to Mentor Training webinar.

## 07.02 - MENTOR WEBINAR - Email Reminder to Register (US & EU)

### Section 07

# Mentor Training

#### 07.02 - Mentor Training Webinar - Email with Registration Link (US & EU)

**Recommended Subject Line:**

Reminder - You still need to register for the Mentor Training webinar on [date]

Dear Mentors,

A quick reminder to register for the upcoming **Mentor Training webinar**, which will be held on [day, date] from [time]-[time & time zone]. This live broadcast will provide an overview of the program, describe mentor/mentee roles, responsibilities and best practices, and help you prepare for the upcoming kickoff event.

To register, click on this link [insert Attendee link to the Mentor Training webinar] and provide the requested information. Once you do, you will receive your personal webinar access information (link and phone number) by return email.

We look forward to connecting with you during this virtual session!

Warm wishes,

Mentoring Program Committee  
HBA [Region]

### For Mentor Training webinar

- Send to mentors who have not yet registered from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to Mentor Training webinar.

# Mentor Training

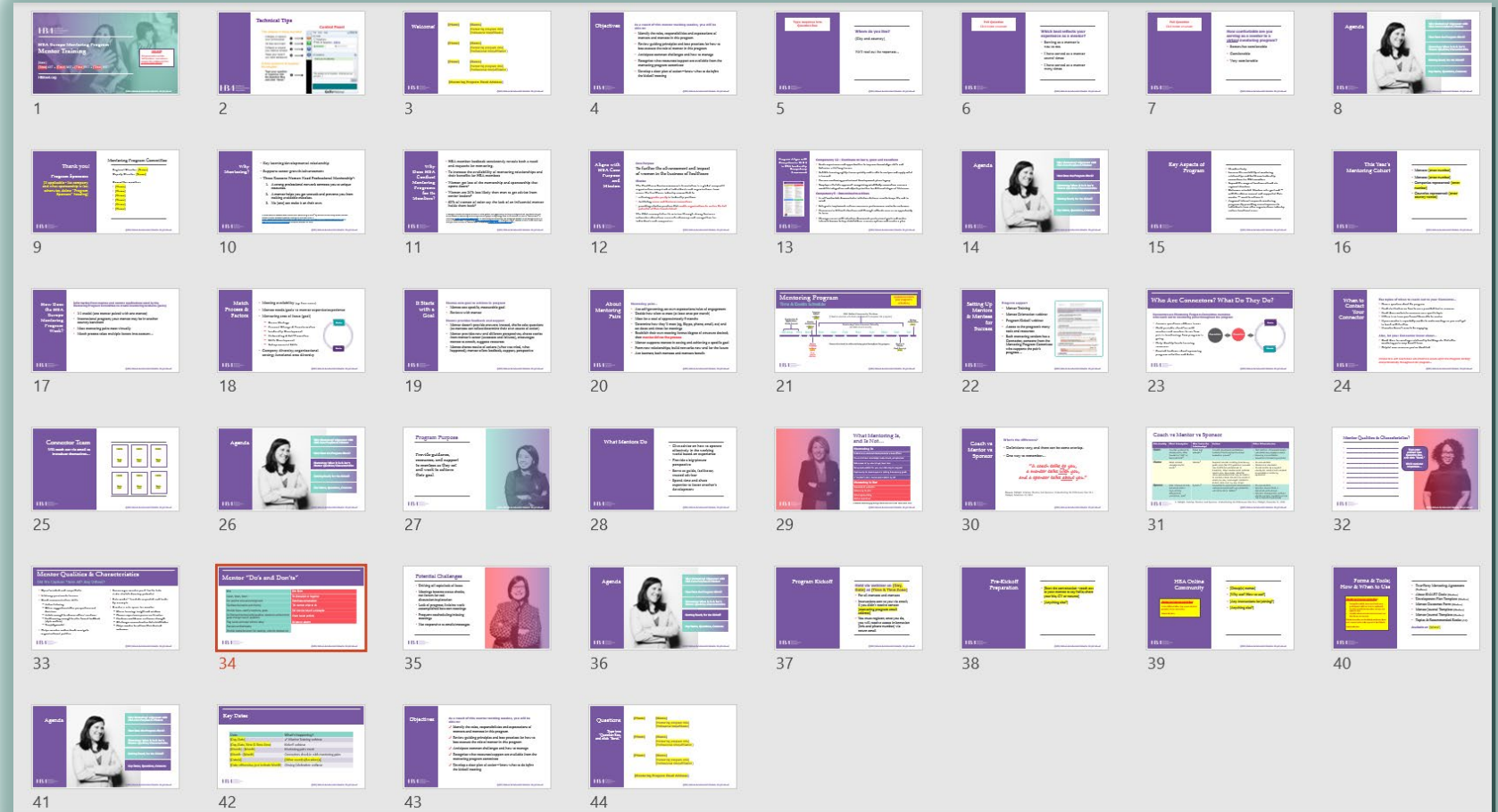
# 07.04 - MENTOR WEBINAR - Slides (EU)

## Section 07

# Mentor Training

## Complete slide deck (44 slides) for Mentor Training webinar (1:1 program)

- See notes within slide deck.





## 07.05 - MENTOR WEBINAR - Email with Link to Recorded Webinar (US & EU)

### Section 07

# Mentor Training

#### 07.05 - Mentor Training - Email with Link to Recorded Webinar (US & EU)

Recommended Subject Line:  
Mentor Training - Link to webinar recording

Dear Mentors,

Thanks to those who joined us for Mentor Training webinar; we hope you found it helpful in preparing for your role as a mentor in this year's program!

For those who were not able to participate in the live broadcast (or for those who might like to review the content again), here is a link to the recorded session: [\[insert link to the Mentor Training webinar recording\]](#). Please view it as soon as possible, as it contains important actions to take in advance of the kickoff.

A PDF of the webinar slides has also been attached for your convenience.

If you have any questions, please don't hesitate to reach out to us at [\[mentoring program email address\]](#).

Warm wishes,

Mentoring Program Committee  
HBA [\[Region\]](#)

### For Mentor Training webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include link to Mentor Training webinar recording.
- Attach PDF of Mentor Training slides to email.

## 08.01 - MENTEE WEBINAR - Email with Registration Link (US & EU)

### Section 08

# Mentee Orientation

#### 08.01 - Mentee Orientation Webinar - Email with Registration Link (US & EU)

Recommended Subject Line:  
Register now - Mentee Orientation webinar on [date]

Dear Mentees,

Welcome to Mentee Orientation for the [year] HBA [Region] Mentoring Program!

Our Mentee Orientation webinar will be held on [day, date] from [time] - [time & time zone]. We look forward to having you join this live broadcast, which will provide an overview of the program, describe mentee/mentor roles, responsibilities and best practices, and help you prepare for the upcoming kickoff event. Ample time will also be provided for a Q&A session with the Mentoring Program Committee.

This session will be held as a webinar and you must register for it by clicking on this link [insert Attendee link to the Mentee Orientation webinar] and providing the requested information. Once you do, you will receive your personal webinar access information (link and phone number) by return email. Register now, so you'll be ready to login to the program and receive reminders about this event from the HBA Education Department webinar platform.

Both new and returning mentees should attend this required orientation, as several important changes and innovations have been made to this year's program. Everyone is encouraged to attend the live broadcast; however, the webinar will be recorded for those with scheduling conflicts.

We look forward to connecting with you during this virtual session on [date]!

Warm wishes,

Mentoring Program Committee  
HBA [Region]

### For Mentor Training webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to Mentee Orientation webinar.



## 08.02 - MENTEE WEBINAR - Email Reminder to Register (US & EU)

### Section 08

# Mentee Orientation

#### 08.02 - Mentee Orientation Webinar - Email with Registration Link (US & EU)

**Recommended Subject Line:**

Reminder - You still need to register for the Mentee Orientation webinar on [date]

Dear Mentees,

A quick reminder to register for the upcoming **Mentee Orientation webinar**, which will be held on [day, date] from [time]-[time & time zone]. This live broadcast will provide an overview of the program, describe mentee/mentor roles, responsibilities and best practices, and help you get ready for the kickoff event.

To register, click on this link [insert Attendee link to the Mentee Orientation webinar] and provide the requested information. Once you do, you will receive your personal webinar access information (link and phone number) by return email.

We look forward to connecting with you during this virtual session!

Warm wishes,

Mentoring Program Committee  
HBA [Region]

### For Mentee Orientation webinar

- Send to mentees who have not yet registered from your mentoring program's email account.
- Review & customize with your program's information.
- Include Attendee registration link to Mentee Orientation webinar.

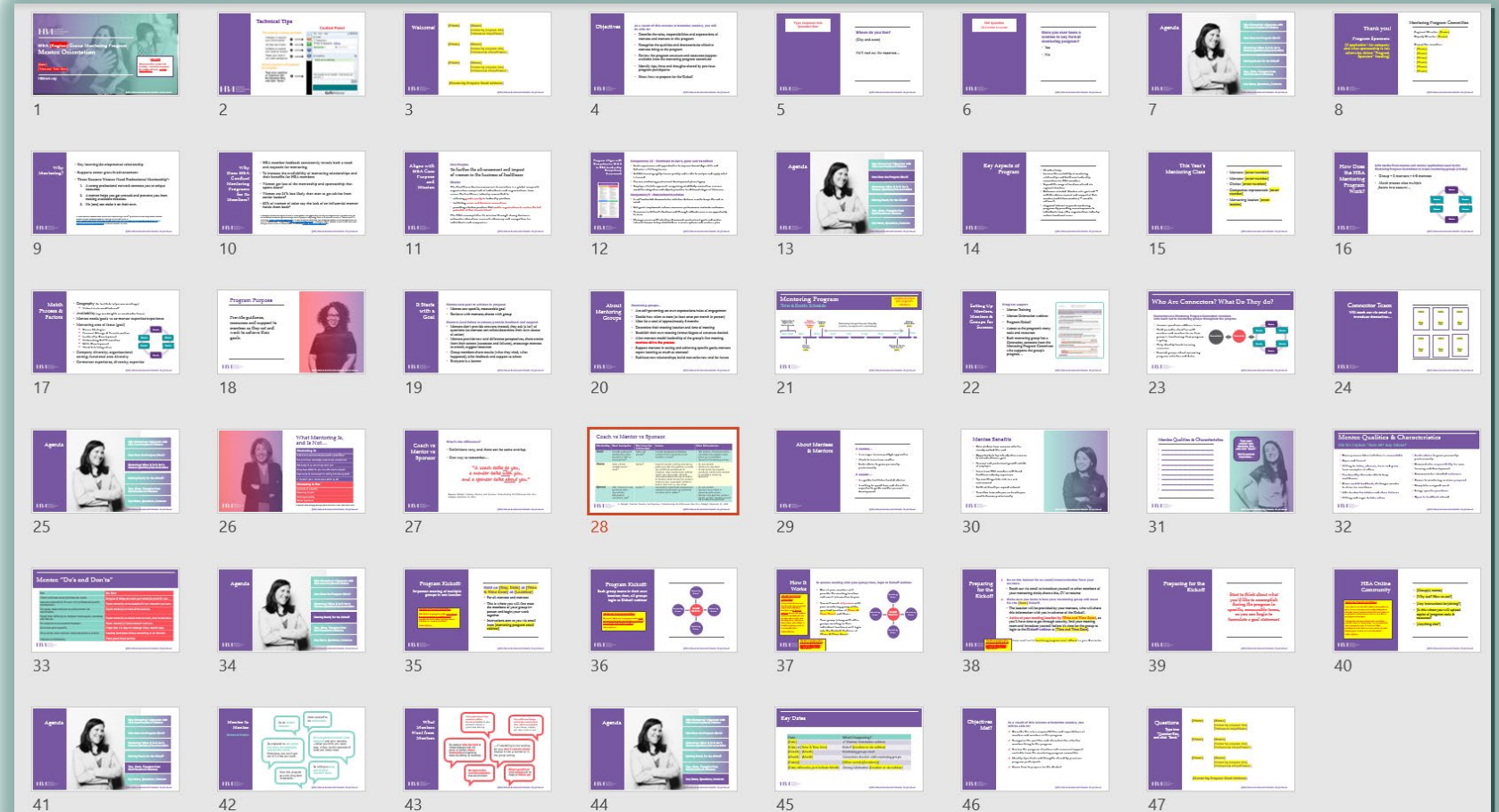
# 08.03 - MENTEE WEBINAR - Slides (US)

## Section 08

# Mentee Orientation

Complete slide deck (47 slides) for Mentee Orientation webinar (group mentoring programs).

- See notes within slide deck.



# Section 08

## Mentee

## Orientation

- See notes within slide deck.



## 08.05 - MENTEE WEBINAR - Email with Link to Recorded Webinar (US & EU)

### Section 08

# Mentee Orientation

#### 08.05 - Mentee Orientation Webinar - Email with Link to Recorded Webinar (US & EU)

Recommended Subject Line:  
Mentee Orientation - Link to webinar recording

Dear Mentees,

Thanks to those who joined us for the Mentee Orientation webinar; we hope you found it helpful in preparing for your role as a mentee in this year's program!

For those who were not able to participate in the live broadcast (or for those who might like to review the content again), here is a link to the recorded session: [insert link to the Mentee Orientation webinar recording](#). Please view it as soon as possible, so you're ready for the upcoming kickoff event.

A PDF of the webinar slides has also been attached for your convenience. [attach PDF of Mentee Orientation slides to this email](#)

If you have any questions, please don't hesitate to reach out to us at [mentoring program email address](#).

Warm wishes,

Mentoring Program Committee  
HBA [Region](#)

### For Mentee Orientation webinar recording

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include link to Mentee Orientation webinar recording.
- Attach PDF of Mentee Orientation slides to email.

## 09.01 - KICKOFF WEBINAR - Email with Registration Link (US & EU)

### Section 09

## Kickoff Event

#### 09.01 - Kickoff Webinar - Email with Registration Link (US & EU)

Recommended Subject Line:  
Register now - Kickoff webinar on [date]

Dear Mentees and Mentors, *((Note: If following the new virtual kickoff model, only Mentors register for the kickoff webinar.))*

We are delighted to be kicking off the [year] HBA [region] Mentoring Program via webinar on [day, date] at [time(s) & time zone(s)]. *((Note: If program participants are from multiple time zones, recommend listing all major times & time zones.))*

This session will be held as a webinar, and **you must register for it by clicking on this link** [insert Attendee link to the Kickoff webinar] and providing the requested information. Once you do, you will receive your personal webinar access information (link and phone number) by return email. Register now, so you'll be ready to login to the program and receive reminders about this event from the HBA Education Department webinar platform.

We look forward to connecting with you soon!

Warm wishes,

Mentoring Program Committee  
HBA [Region]

#### For Kickoff webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to the Kickoff webinar.
- If following the new virtual kickoff model, only mentors register for the Kickoff webinar.

## 09.02 - KICKOFF WEBINAR - Email Reminder to Register (US & EU)

### Section 09

# Kickoff Event

#### 09.02 - Kickoff Webinar - Email Reminder to Register (US & EU)

Recommended Subject Line:

Reminder - You still need to register for the Kickoff webinar on [date]

Dear \_\_\_\_\_, *((Send to those who have not yet registered. Note: If following the new virtual kickoff model, only Mentors need to register for the Kickoff webinar.))*

You still need to register for the Kickoff webinar, which will be broadcast live on [day, date] at [time(s) & time zone(s)]. *((Note: If program participants are from multiple time zones, recommend listing all major times & time zones.))*

Click here to register: [insert Attendee link to the Kickoff webinar]. Once you do, you will receive your personal webinar access information (link and phone number) by return email.

We look forward to connecting with you soon!

Warm wishes,

Mentoring Program Committee

HBA [Region]

### For Kickoff webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to the Kickoff webinar.
- Send to those who still haven't registered. (Note: If following the new virtual kickoff model, only mentors register for the Kickoff webinar.)

## 09.03 - FACE-TO-FACE KICKOFF - Final Reminder & Meeting Confirmation (US)

### Section 09

# Kickoff Event

#### 09.03 - F2F Kickoff - Final Reminder & Meeting Confirmation (US)

[year] HBA [region] Mentoring Program Kickoff Meeting  
[day, date]  
[start time - end time]

Dear Mentoring Colleagues,

We're looking forward to seeing you at the [date] Kickoff Meeting. This is your final reminder/meeting confirmation, which includes a summary of important information.

#### Date/Time

[day, date]

[start time - end time]

- Registration opens at [time]. Don't miss the opportunity to network with mentoring program participants and committee members before the program starts. Bring your business cards!
- Dinner with your mentoring group is from [start time - end time].
- The formal program will begin promptly at [time].

#### Place

[company/venue name]

[street address]

[city, state, zip]

[company/venue phone number]

#### Meeting Location

[building number, floor number, room number]

Note: Photo ID required to be admitted to the building. ((delete if not applicable))

#### Directions, Parking, Other Information

1. Directions: ((add directions here or attach))
2. Parking: ((add parking information here or attach; delete if not applicable))
3. Construction/Traffic Advisory: ((add any construction/traffic information here; delete if not applicable))
4. ((add any other information/instructions for this meeting here, eg, are mentors and/or mentees required to bring anything [eg, completed forms, draft goals, etc] to the meeting?))

#### Mentoring Program Committee - Emergency Contact Number (Day of Meeting)

[name] - [cell phone number]

If you have any questions prior to the Kickoff, please do not hesitate to reach out to us at [mentoring program email address].

We look forward to a special evening of learning, collaboration, and new beginnings!

Warm wishes,

Mentoring Program Committee

HBA [region]

**For Face-to-Face (F2F) Kickoff Meeting  
of All Groups Together in One Location  
(usually at a sponsored venue)**

- Use this template to send out a final reminder & meeting confirmation to all mentors & mentees several days before the Kickoff.
- Review & customize with your program's information & instructions.
- Send from your mentoring program's email account.



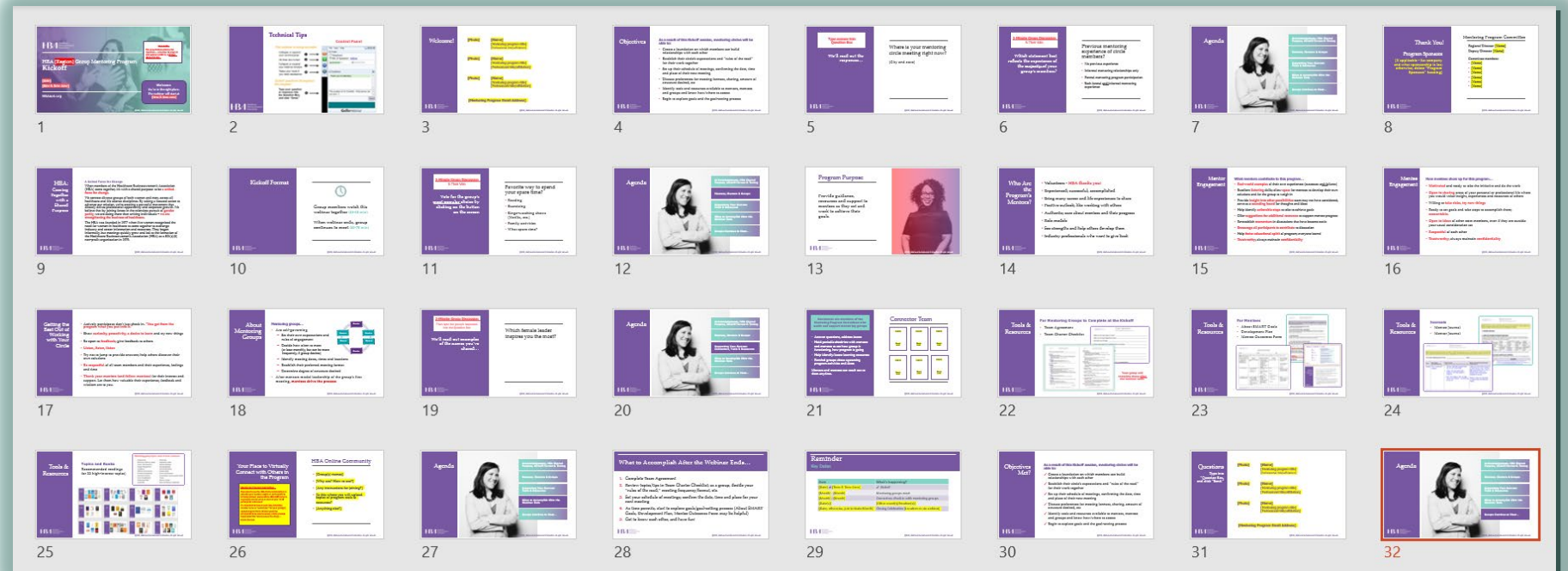
# 09.04 - KICKOFF WEBINAR - Slides (US)

## Section 09

# Kickoff Event

## Complete slide deck (32 slides) for Kickoff webinar (group mentoring programs).

- See notes within slide deck.





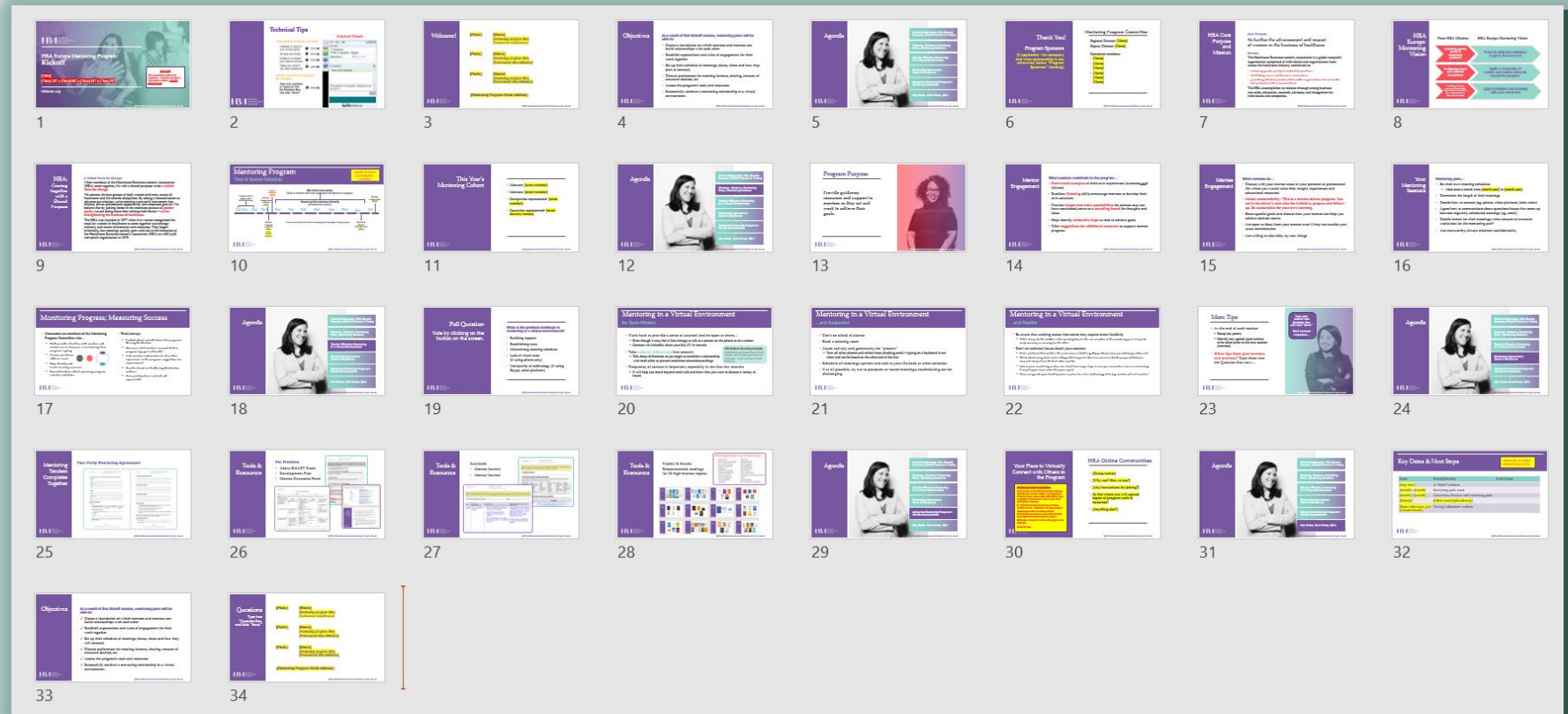
# 09.05 - KICKOFF WEBINAR - Slides (EU)

## Section 09

# Kickoff Event

## Complete slide deck (34 slides) for Kickoff webinar (1:1 program)

- See notes within slide deck.



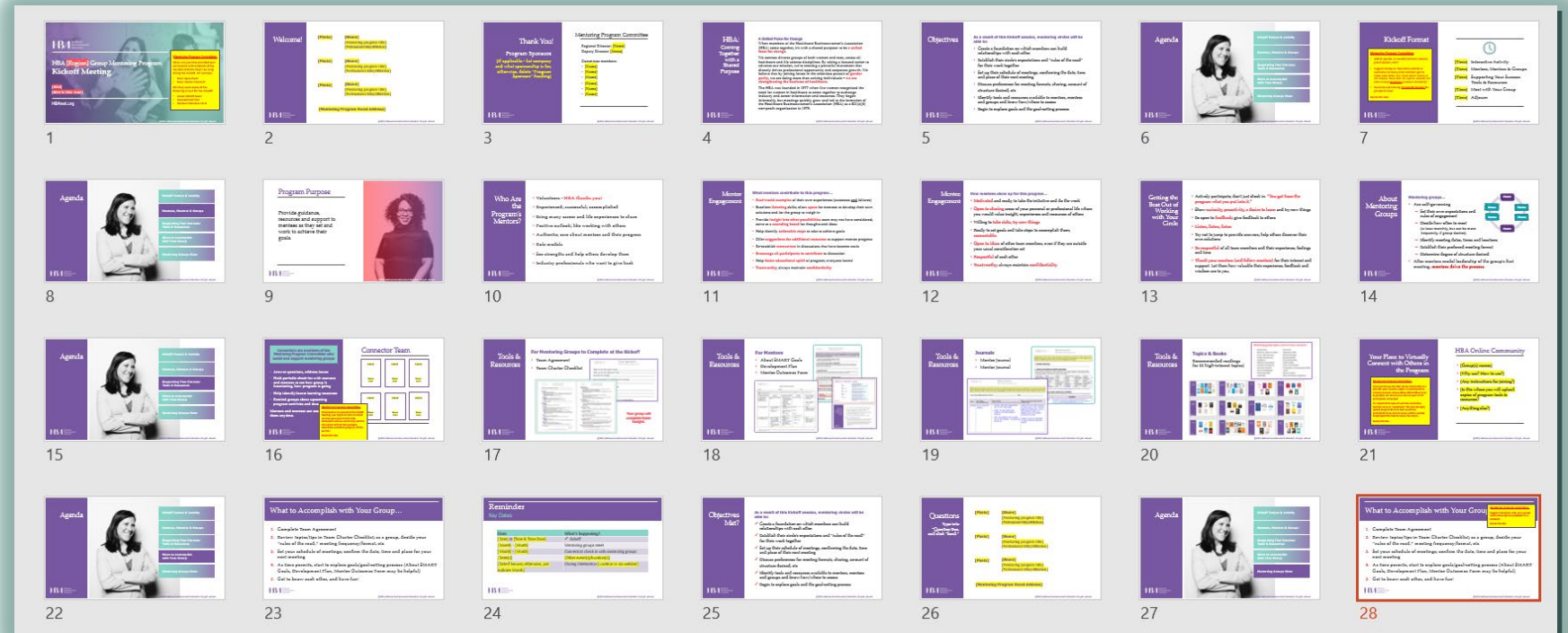
# 09.06 - FACE-TO-FACE KICKOFF MEETING - Slides (US)

## Section 09

# Kickoff Event

## Complete slide deck (28 slides) for Face-to-Face Kickoff Meeting (group mentoring programs)

- See notes within slide deck.




# 09.07 - Vision Board Activity for Face-to-Face Kickoff (US)

## Section 09

# Kickoff Event

### Implementation instructions for Mentoring Program Committees

- Describes activity & time requirements (~40 minutes to conduct/debrief)
- Identifies materials needed & preparation
- Includes examples of vision boards completed by previous mentoring groups
- Provides instructions for debriefing the activity



**Vision Board Activity:**  
Implementation Instructions  
for Mentoring Program Committee

©2018, Healthcare Businesswomen's Association. All rights reserved.

1

Vision Board Activity

HBA Healthcare Businesswomen's Association

**Description**


- Team-building activity that can be used at a face-to-face kickoff event. Requires about 40 minutes to conduct and debrief.
- Fun, engaging, inexpensive and provides insights that mentoring group members may find valuable as they begin their work together.
- Group flips through copies of magazines provided by the mentoring program committee, cutting out photos, illustrations, words, images, etc) and pasting them on a provided poster board as a visual description of team's goals, values, hopes, aspirations. Includes thought-starters to facilitate the exercise and key questions for debriefing this exercise.
- Mentoring program committee provides the materials for this exercise (see slide 4); requires pre-planning to collect copies of magazines (that can be destroyed) and purchase poster boards, scissors, glue sticks, magic markers, etc.

©2018, Healthcare Businesswomen's Association. All rights reserved.

2

Vision Boards

HBA Healthcare Businesswomen's Association



Vision boards are a powerful tool for focusing attention on a shared set of desired outcomes, goals or objectives

©2018, Healthcare Businesswomen's Association. All rights reserved.

3

Preparation & Instructions

HBA Healthcare Businesswomen's Association

**Provide each group with**

A stack of magazines (get copies of old magazines from your mentoring program committee members), scissors, glue sticks, magic markers and a poster board for each group.

**Instructions**

- Give groups 20-30 minutes to use these materials to create a poster or collage that represents their goals, values, hopes or aspirations in working together in the program.
- Consider asking each group to come up with a team "name"; this can help the group to start bonding and identify as a team. Have them write their team name at the top of the poster board. (This becomes their "brand" and you can use it to refer to groups throughout the program.)

See next slide for Debrief...

©2018, Healthcare Businesswomen's Association. All rights reserved.

4

What Groups Can Learn

HBA Healthcare Businesswomen's Association

**Debrief the exercise**

When time is up, have a member of the mentoring program committee (or a program coach, if applicable), ask for volunteers to answer the following:

1. How did your group tackle this project?  
**Points to make:** Groups work in different ways. Did the group immediately dive in and look for interesting pictures? Or were they more process-driven and first identified common goals and then assigned team members to look for certain types of illustrations? What does this mean for the group's work together?
2. Did someone take the lead? Did everyone participate? What did you observe about the communication styles/preferences of fellow team members? What does this mean for the group's work together?  
**Points to make:** This exercise provides food for thought about individual styles. Mentors may realize they need to draw out certain mentees, so that everyone has a chance to participate.

**Tip:** Consider collecting the posters and displaying them again at the closing dinner. If your program has a "group" on the HBA Online Community, consider asking mentoring circle members to take a photo of their poster and post it on the group site...

©2018, Healthcare Businesswomen's Association. All rights reserved.

5

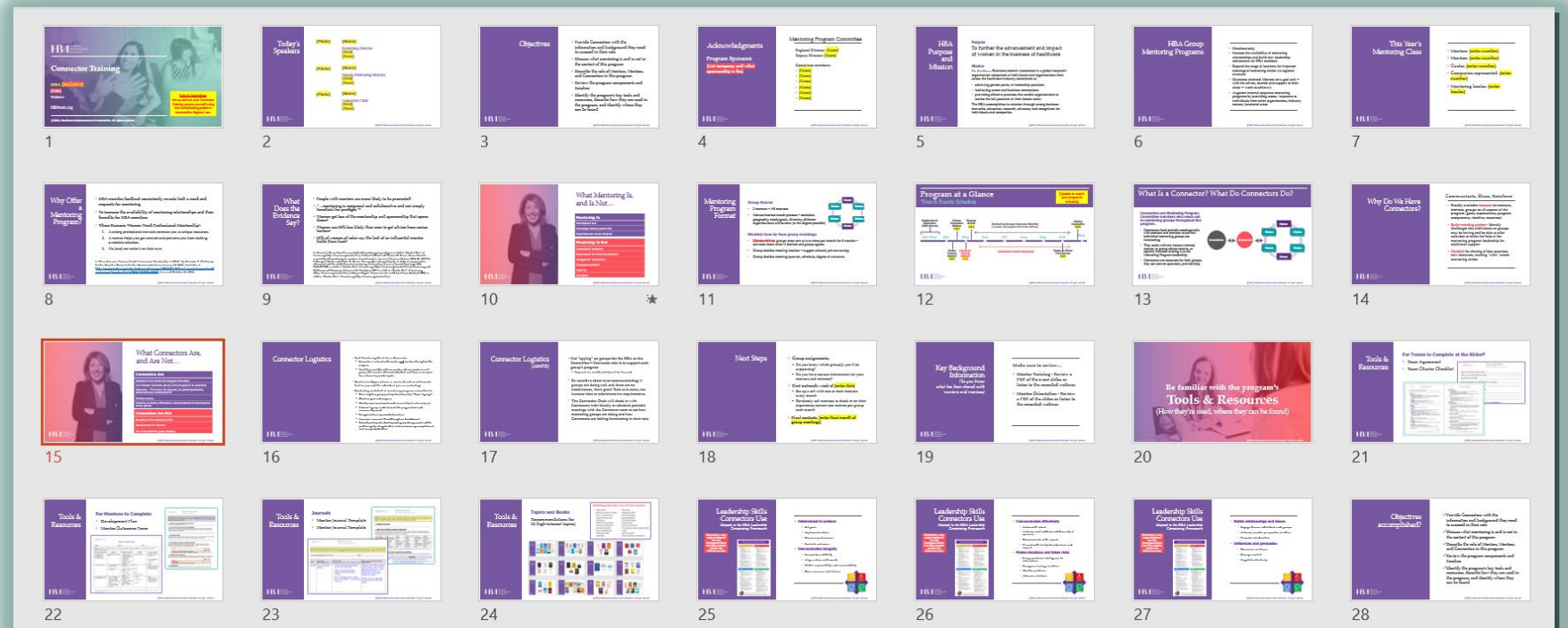
# 10.01 - Connector Training Slides

## Section 10

# Connector Training

### Complete slide deck (29 slides) for Connector Training


- Connector Chair can set up & run your Connector Training session yourself using the GoToMeeting platform reserved for Regions' use or conduct via teleconference, providing copies of slides beforehand.
- Make sure Connectors are able to participate in the Mentor Training & Mentee Orientation sessions (or view the recordings or slides), so they'll know what has been shared with mentors & mentees about roles & responsibilities, how to leverage Connectors, etc.
- Recommend training Connectors before/around the time of the Kickoff Event.



# 11.01 - Team Agreement (US-Circles)

## Section 11

# Forms & Tools: Mentees, Mentors, Circles



### Team Agreement

HBA Mentoring Program Tool

Where we will meet (type of venue): \_\_\_\_\_

When we will meet (days/time of day): \_\_\_\_\_

How often we will meet: \_\_\_\_\_

Person responsible for co-ordinating the first meeting: \_\_\_\_\_

And the second: \_\_\_\_\_

Some top-level goals of our team are:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

We understand and agree that each of us is responsible for:

- Maintaining the confidentiality of any and all information shared
- Meeting at the times we agree to
- Listening, responding and sharing as an active participant in the group and program
- Other team rules we agree to adhere to: \_\_\_\_\_

\_\_\_\_\_

*I agree to abide by the rules and understandings developed by our Mentoring Group and summarized above. I will make my best effort to prepare for, attend, and actively participate in our meetings. If at any time during the program I find that I cannot continue to fulfil these or other program-related responsibilities, I will promptly notify my teammates, with the goal of minimizing disruption to the team and its dynamics.*

Mentoring Group Signatures:

_____	_____
_____	_____
_____	_____
_____	_____

Each Mentoring Group member should receive a copy of this Team Agreement.

Developed by the HBA Metro Chapter Mentoring Program Committee. Permission granted for use, distribution, photocopying, and posting within HBA mentoring programs. Retain this credit line.



# 11.02 - Team Charter Checklist (US-Circles)

## Section 11

# Forms & Tools: Mentees, Mentors, Circles

HBA Healthcare Businesswomen's Association	Team Charter Checklist HBA Mentoring Program Tool
Team Name and/or Mentoring Area of Focus: _____	
<b>Expectations</b>	
1. <u>Everything is in service to the learning</u>	
<input type="checkbox"/> We will discuss how we can be of most help to one another and really listen to what is being said.	
<input type="checkbox"/> We will emphasize encouragement, ask if we can offer feedback, and make that feedback as gracious and helpful as possible.	
<input type="checkbox"/> We will share our own experiences—successes and failures.	
2. <u>Accountability</u>	
<input type="checkbox"/> Mentors and Mentees are accountable to each other and to the group.	
<input type="checkbox"/> Mentees make a commitment to grow and do the work.	
<input type="checkbox"/> Mentors make a commitment to keep process on track and identify resources.	
3. <u>Any other key expectations?</u> _____	
<b>Ground Rules</b>	
1. <u>Confidentiality</u>	
<input type="checkbox"/> Everything that's said in the group, stays in the group.	
2. <u>Participation</u>	
<input type="checkbox"/> We will schedule our meetings and conduct them as planned, even if someone can't make it.	
<input type="checkbox"/> If a member can't attend, she/he will call someone to tell the group.	
<input type="checkbox"/> We will start and end our meetings on time.	
<input type="checkbox"/> Everyone will be provided with an opportunity to participate and be encouraged to do so.	
<input type="checkbox"/> We agree to be fully present in meetings—no multi-tasking!	
<input type="checkbox"/> If unforeseen circumstances lead an individual to conclude she/he can no longer participate in the program, she/he will let the Mentors know, and Mentors will inform their Connector or a Mentoring Program Committee member.	
3. <u>Honesty</u>	
<input type="checkbox"/> We agree to be open and honest with each other.	
<input type="checkbox"/> If Mentees feel they are not getting what they need, they will let their Mentors know.	
4. <u>Responsibility</u>	
<input type="checkbox"/> Mentees own their outcomes.	
<input type="checkbox"/> Mentees drive the program (Mentors provide a model, offer guidance, and identify resources).	
5. <u>Professionalism</u>	
<input checked="" type="checkbox"/> We will observe the HBA Etiquette Policy - Required	
<input type="checkbox"/> We will not recruit each other for our respective organizations.	
<input type="checkbox"/> We will let the Mentoring Program Committee know if any unusual issues or problems arise.	
6. <u>Other ground rules?</u> _____	
Next page...	
Copyright © 2016 by Liz Stueck (lizstueck@yahoo.com). All rights reserved. Permission granted for use, distribution, photocopying, and posting in HBA mentoring programs. Retain this credit line.	

HBA Healthcare Businesswomen's Association	Team Charter Checklist HBA Mentoring Program Tool
<b>Meeting Formats</b>	
1. <u>Some recommendations</u>	
<input type="checkbox"/> Use Mentee goals to drive each meeting. Discuss steps taken, results, obstacles encountered, feedback from Mentors and Mentees, what was learned.	
<input type="checkbox"/> Recap agreements/action steps at the end of each meeting.	
<input type="checkbox"/> Ask what the value of each session was and how the next session can be made even more valuable.	
<input type="checkbox"/> Develop a plan and follow it!	
2. <u>Ideas</u>	
<input type="checkbox"/> Consider opening each meeting with a discussion of a previously made assignment. (eg, article, book chapter, podcast, evaluation tool)	
<input type="checkbox"/> Use role playing, other exercises	
<input type="checkbox"/> Agenda for each meeting? Who prepares? Who distributes? How far in advance of each meeting?	
<input type="checkbox"/> Notes from each meeting? Who prepares? How used? Who distributes?	
<b>Meeting Planning</b>	
1. <u>How will our team convene?</u>	
<input checked="" type="checkbox"/> In-person meetings <input type="checkbox"/> Virtual sessions <input type="checkbox"/> Both	
<input checked="" type="checkbox"/> <b>Tip:</b> In-person meetings are highly recommended, especially as you get started! Consider meeting for dinner, or just dessert. Have a brown bag dinner in a conference room for meet before or after another HBA event. In-person meetings are almost always "richer" than virtual meeting, even for established teams.	
2. <u>When will our team meet?</u>	
<input checked="" type="checkbox"/> Weekdays <input type="checkbox"/> Weekends <input type="checkbox"/> Early morning <input type="checkbox"/> Lunchtime <input type="checkbox"/> After work	
<input checked="" type="checkbox"/> <b>Tip:</b> In some geographies, meetings scheduled around weekday lunch hours can be challenging.	
3. <u>How long will our meetings last?</u>	
<input checked="" type="checkbox"/> 1.5 hours <input type="checkbox"/> 2 hours <input type="checkbox"/> Longer <input type="checkbox"/> Varies	
<input checked="" type="checkbox"/> <b>Tip:</b> For most groups, one hour won't provide enough time for a meaningful session.	
4. <u>How many times will we meet each month?</u>	
<input checked="" type="checkbox"/> Once <input type="checkbox"/> Twice <input type="checkbox"/> More <input type="checkbox"/> Varies	
<input checked="" type="checkbox"/> <b>Tip:</b> The most successful groups meet at least twice/month with one of those meetings in-person.	
5. <u>Who plans/leads each meeting?</u>	
<input checked="" type="checkbox"/> Mentors (first meeting) <input type="checkbox"/> Mentee(s) - responsibility rotates so all get a turn to lead <input type="checkbox"/> Both	
<input checked="" type="checkbox"/> <b>Recommendation:</b> One or both Mentors lead the first meeting; they help establish a format and provide a model to emulate. Subsequent meetings are led by a Mentee—rotate this responsibility, so all get a turn. Ultimately, this is a Mentee-driven program and part of the learning process is providing Mentees with opportunities to develop their leadership.	
<b>Date/Time/Place of First Meeting:</b> _____	
<input checked="" type="checkbox"/> <b>Recommendation:</b> Consider setting dates for all meetings now. Include any other mentoring program events (eg, Closing Celebration) on your calendar.	
Copyright © 2016 by Liz Stueck (lizstueck@yahoo.com). All rights reserved. Permission granted for use, distribution, photocopying, and posting in HBA mentoring programs. Retain this credit line.	

## 11.03 - Two-Party Mentoring Agreement (EU-Tandems)

### Section 11

## Forms & Tools: Mentees, Mentors, Circles

HBA Healthcare Businesswomen's Association	Two-Party Mentoring Agreement HBA Mentoring Program Tool	HBA Healthcare Businesswomen's Association	Two-Party Mentoring Agreement HBA Mentoring Program Tool
<p>This confidential mentoring agreement is made between the following parties:</p> <p><b>Mentee</b></p> <p>Name: _____</p> <p>Address: _____</p> <p>City/State/Country: _____</p> <p>Email: _____</p> <p>Phone: _____</p> <p><b>Mentor</b></p> <p>Name: _____</p> <p>Address: _____</p> <p>City/State/Country: _____</p> <p>Email: _____</p> <p>Phone: _____</p> <p><b>Details of Relationship</b></p> <ul style="list-style-type: none"><li>• Timing As a mentoring tandem in the HBA Europe Mentoring Program, we agree to meet on a regular basis beginning: _____ and ending: _____. (month, year) (month, year)</li><li>• Location/Method of Meeting: <input type="checkbox"/> Location (if face-to-face/in-person): _____ <input type="checkbox"/> Telephone <input type="checkbox"/> Skype <input type="checkbox"/> Other: _____</li><li>• Additional Contact - Both parties agree to additional contact via phone and/or email, if necessary.</li></ul> <p>Page 1 of 2</p> <p>© 2018, Healthcare Businesswomen's Association. All rights reserved.</p>		<p><b>Content of Mentorship (Topics)</b></p> <p>_____</p> <p>_____</p> <p>_____</p> <p><b>Expectations (Mentee)</b></p> <p>_____</p> <p>_____</p> <p>_____</p> <p><b>Expectations (Mentor)</b></p> <p>_____</p> <p>_____</p> <p>_____</p> <p><b>Other Provisions</b></p> <ul style="list-style-type: none"><li>• This relationship between mentee and mentor is a voluntary agreement in which both parties commit to work on the topics identified above.</li><li>• Mentee and mentor will prepare appropriately for their meetings.</li><li>• Mentee will set-up and document the sessions.</li><li>• Mentor will provide constructive guidance and support in setting up and conducting these meetings.</li></ul> <p>Both parties agree that all information, content, and communications shared and exchanged within this mentoring relationship will be treated as confidential.</p> <p><b>Agreed and understood</b></p> <p>Mentee Signature: _____ Date: _____</p> <p>Mentee Signature: _____ Date: _____</p> <p>Page 2 of 2</p> <p>© 2018, Healthcare Businesswomen's Association. All rights reserved.</p>	

## 11.04 - About SMART Goals (Mentees)

### Section 11

# Forms & Tools: Mentees, Mentors, Circles

1  
★

About  
SMART  
Goals

**What is a SMART goal?**

**S** Specific

Is goal clear and unambiguous?  
What result do you want to achieve?  
What will be different for you?  
How will achieving this goal change what you do, feel, earn, know?

**M** Measurable

How will you know you've achieved the goal?  
How will you track your progress?

**A** Action-oriented

What actions will make this goal achievable?  
What might get in the way of achieving this goal?  
What will make it more achievable?

**R** Realistic

What obstacles might be encountered?  
Does this goal fit with your time, knowledge, background, limitations?

**T** Time-bound

What's a reasonable time frame to achieve this?  
What time frame would stretch you?  
What milestone can you reach during this program/next six months?

2

Setting,  
Linking &  
Achieving  
Goals

- Set a "S.M.A.R.T." goal to accomplish during the program
- Develop 2-3 objectives that will help you make progress toward accomplishing your "S.M.A.R.T." goal
- Focus on strategies that can be executed during the length of the program with support from your circle
- If goal is reached, update action plan and set a new goal

**Mentees: If appropriate, consider...**

1. Connecting the goal/development plan you create for this program to what you are pursuing professionally in your organization.
2. Discussing your mentoring program goal/plan with your manager, so your achievements as part of this program align with your organization's goals/priorities and support your growth and advancement.

©2018, Healthcare Businesswomen's Association. All rights reserved.



# 11.05 - Development Plan (Mentees)

## Section 11

# Forms & Tools: Mentees, Mentors, Circles



### Sample Development Plan

Mentee: \_\_\_\_\_ Mentor: \_\_\_\_\_ Date: \_\_\_\_\_



**Goal:** By the end of 18 months, become a more efficient staff manager as judged by my manager, team, and an objective measurement

Development Objectives	Measures	Development Activities	Timeline	Resources/Support
1. Choose project management skills, knowledge and attitudes to develop	Prepared list of targeted areas	<ul style="list-style-type: none"> <li>Interview project management expert</li> <li>Summarize ideal PM competencies</li> <li>Assess current competence</li> <li>Choose 1 strength to leverage &amp; 2 to develop</li> </ul>	By end of 1 month	<ul style="list-style-type: none"> <li>Manager, mentor, other expert</li> <li>Project management assessment tool</li> <li>Manager</li> </ul>
2. Build competence	<ul style="list-style-type: none"> <li>I score 50% higher on assessment tool</li> <li>Manager says I'm improving</li> </ul>	<ul style="list-style-type: none"> <li>Subscribe to journals, search Web</li> <li>Shadow mentor &amp; at least 1 other project leader</li> <li>Take 2 classes</li> <li>Study past project reports</li> </ul>	Month 1  Month 2  Month 2-3  Throughout the year	<ul style="list-style-type: none"> <li>Mentor</li> <li>Another project leader</li> <li>Funding for classes</li> <li>Self-study materials</li> </ul>
3. Successfully manage a challenging project	<ul style="list-style-type: none"> <li>Project completed on time &amp; in budget</li> <li>I'm more confident managing people (from 5-9 on a 10-point scale)</li> <li>Team members give me a high approval rating</li> </ul>	<ul style="list-style-type: none"> <li>Meetings with manager &amp; team</li> <li>Self-study</li> <li>Another project leader observes me lead a team meeting</li> <li>Re-take assessment tool</li> </ul>	Months 3-8  Months 4 and 7  Month 8	<ul style="list-style-type: none"> <li>Mentor</li> <li>Another project leader</li> <li>Study materials</li> <li>Project management assessment tool</li> </ul>

Developed by Carol Vanacore and Carol Nicholson. Permission granted for use, distribution, photocopying, and posting within HBA mentoring programs. Retain this credit line.

# 11.06 - Mentee Outcomes Form (Mentees)

## Section 11

# Forms & Tools: Mentees, Mentors, Circles

**HBA** Healthcare  
Businesswomen's  
Association

Mentee Outcomes Form  
HBA Mentoring Program Tool

*INSTRUCTIONS: Mentees complete steps 1-4 either prior to the Kickoff or before the first meeting of their mentoring group; check desired timing with the Mentoring Program Committee. It is recommended that a review and discussion of each Mentee's goals serve as the initial subject/focus of the group's first meeting. If goals need to be revised following that discussion, Mentees should feel free to do so.*

**1. INDICATE YOUR MENTORING AREA OF FOCUS**  
What is your mentoring area of focus? \_\_\_\_\_

**2. SET A SPECIFIC GOAL & MAKE IT MEASURABLE**  
Drill down in your mentoring focus area, and formulate the goal you will work to achieve during this program. Make sure your goal is specific as well as appropriate for this program's 6-month timeframe. State your goal in measurable terms.  
\_\_\_\_\_  
\_\_\_\_\_

**3. ENVISION SUCCESS**  
Describe a scenario in which you have achieved your goal. What is your accomplishment, and how do you feel? What are you saying to yourself? What are you hearing others say about you?  
\_\_\_\_\_  
\_\_\_\_\_

**4. PLOT YOUR START POINT & DESIRED OUTCOME**  
Use a 10-pt scale to quantify where you are now in relation to achieving your goal: this is your **Start Point**. Then use the same 10-pt scale to plot where you expect to be after 6 months of group mentoring sessions: this is your **Desired Outcome**.

Lowest/None 1.....2.....3.....4.....5.....6.....7.....8.....9.....10 Highest/Ideal

Rating (1-10)	
<b>Start Point</b> - My status at the beginning of the program	
<b>Desired Outcome</b> - Where I expect to be at the end of the program	

**5. PROGRESS CHECK: Midcourse**  
Enter the numeric value you assigned for your **Start Point** and **Desired Outcome**. Then quantify the progress you made by the program's **midpoint**, assign a number to it, and enter that value below.

Rating (1-10)	
<b>Start Point</b>	
<b>Desired Outcome</b>	
<b>Midpoint Progress</b> - Where I am at the program's midpoint	

**6. FINAL RESULTS**  
Enter the numeric value you assigned for your **Start Point** and **Desired Outcome**. Then quantify

# 11.07 - Mentee Journal (Mentees)

## Section 11

## Forms &

## Tools:

Mentees,

Mentors,

Circles

**INSTRUCTIONS:** Use this journal to chart the steps taken to accomplish the goal recorded in the Mentee Outcomes Form. Identify any preparation or prework needed. Record what happens, and seek feedback from your team. Identify what you learned, and whether taking that step moved you closer to accomplishing your overall goal.

### 1. RECORD YOUR GOAL

### 2. WHAT DO YOU NEED TO ACHIEVE YOUR GOAL?

Circle any qualities, characteristics, and/or competencies that you need to acquire to make progress toward achieving your overall program goal. Think about how you can develop, strengthen, or practice these items in the individual **steps** you take toward your goal. Some examples:

Analytic abilities	Balance	Boldness	Communication skills	Compassion	Confidence
Conflict management	Coping with change	Courage	Creativity	Decision-making	Delegation
Empathy	Emotional intelligence	Energy	Enthusiasm	Feedback skills	Financial skills
Flexibility	Giving credit	Honesty	Innovation	Integrity	Intuition
IT skills	Listening skills	Managing emotions	Openness	Optimism	Organizational skills
Passion	Patience	Persuasiveness	Political savvy	Presentation skills	Problem-solving
Respect	Risk-taking	Self-perception	Steadfastness	Strategic thinking	Strength
Team player	Time management	Trust	Vulnerability	Other:	Other:

Note: The "Ideas Into Action Guidebooks" published by the [Center for Creative Leadership](#) has booklets available on many of these topics.

### 3. MONTHLY RECORD OF STEPS TAKEN & KEY LEARNINGS

Each month, identify the step(s) taken toward accomplishing your overall goal, and record what you've learned.

	EXAMPLE
<b>Step(s)</b> to take this month to accomplish my overall goal	Meet with HR to discuss skills and experiences they would look for in a candidate for a brand product manager position. Discuss their assessment of my current skill set and opportunities/resources to fill in gaps.

# 11.08 - Mentor Journal (Mentors)

## Section 11

# Forms & Tools: Mentees, Mentors, Circles

*INSTRUCTIONS: Please use this journal to keep track of the topics your group discusses and the resources you use / recommend for each, so we can share new topics and resources with other HBA mentoring programs. Each month, take time to reflect on what you've learned, and identify any new insights you've gained, and use the far-right column to capture these insights. At the end of the program, you may be asked to share the list of topics discussed and resources used (ie, information in columns 2 and 3).*

**Your Group's Mentoring Area of Focus:** \_\_\_\_\_ **Name:** \_\_\_\_\_

Month	List of Topics Discussed/Addressed	Resources Used (Articles, Books, Web sites, Exercises, Instruments, Tools)	What I Learned About Mentoring; New Insights Gained
Example	How to increase self-confidence	<ul style="list-style-type: none"><li>Ted Talk: "Your Body Language Shapes Who You Are." (Amy Cuddy)</li><li>Article: "The Science Behind Self-Confidence," by Margie Warrell, at Forbes.com</li><li>Book: "The Confidence Code," by Katty Kay and Claire Shipman – Our group took the quiz, too</li></ul>	<p>I don't have to have all the answers to be a good mentor; in fact, I should be asking more questions than I answer. I offer experience, wisdom, and empathy, which can be powerful motivators for mentees.</p> <p>Meeting in person has really helped our group to bond and make quick progress!</p>

## 11.09 - Team Tracking Form (US-Mentors)

### Section 11

## Forms & Tools: Mentees, Mentors, Circles



### Team Tracking Form HBA Mentoring Program Tool

<b>Synopsis of Mentee's overall (program) goal</b>					
<b>Definition of success</b>					
<b>Month 1</b>	<b>Mentee 1: _____</b>	<b>Mentee 2: _____</b>	<b>Mentee 3: _____</b>	<b>Mentee 4: _____</b>	<b>Mentee 5: _____</b>
Specific step Mentee will take this month toward goal					
Tools, resources offered or recommended					
Result (what happened due to Mentee taking this step?)					
Feedback from Mentors/Mentees					
Evaluation of step taken					
<b>Month 2</b>	<b>Mentee 1</b>	<b>Mentee 2</b>	<b>Mentee 3</b>	<b>Mentee 4</b>	<b>Mentee 5</b>
Specific step Mentee will take this month toward goal					
Tools, resources offered or recommended					
Result (what happened due to Mentee taking this step?)					
Feedback from Mentors/Mentees					
Evaluation of step taken					
<b>Month 3</b>	<b>Mentee 1</b>	<b>Mentee 2</b>	<b>Mentee 3</b>	<b>Mentee 4</b>	<b>Mentee 5</b>
Specific step Mentee will take this month toward goal					
Tools, resources offered or recommended					
Result (what happened due to Mentee taking this step?)					
Feedback from Mentors/Mentees					
Evaluation of step taken					

Page 1 of 2

Developed by Tom Dyer, Mary Roberts, and Liz Stueck. Permission granted for use, distribution, photocopying, and posting within HBA mentoring programs. Retain this credit line.

## Section 11

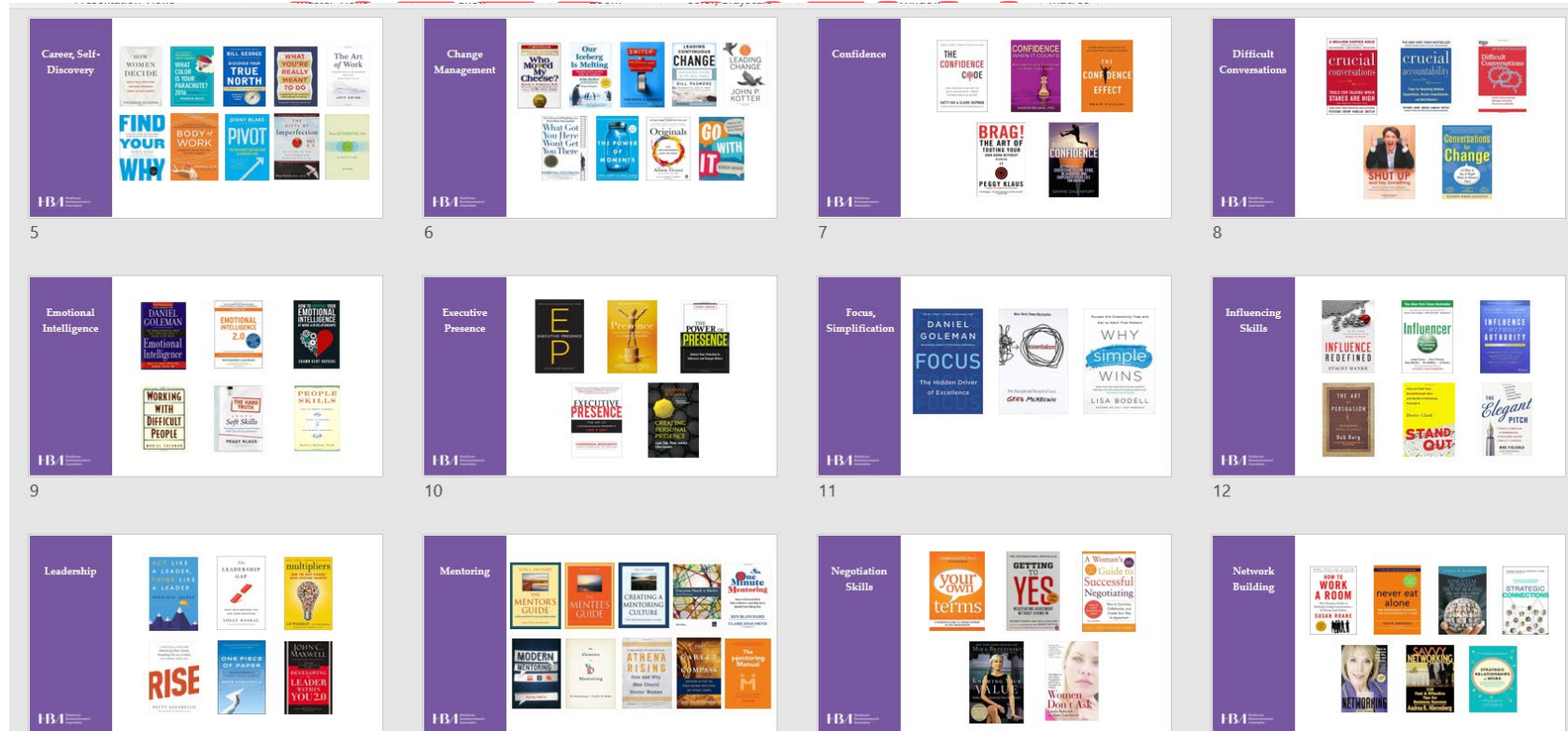
# Forms & Tools: Mentees, Mentors, Circles

## 11.10 - Topics & Books (All)

Recommended readings for  
22 high-interest topics).  
May be of use/interest to  
mentors & mentees.

### Mentoring group topics, areas of focus, resources

- Assessments
- Behaviors, Patterns, Habits
- Career, Self-Discovery
- Change Management
- Confidence
- Difficult Conversations
- Emotional Intelligence
- Executive Presence
- Focus, Simplification
- Influencing Skills
- Leadership
- Mentoring
- Negotiation Skills
- Network Building
- Neuroleadership
- Personal Branding
- Political Skills
- Power and Potential
- Presentation, Communication Skills
- Teams
- Women, Gender
- Work-Life Balance, Happiness

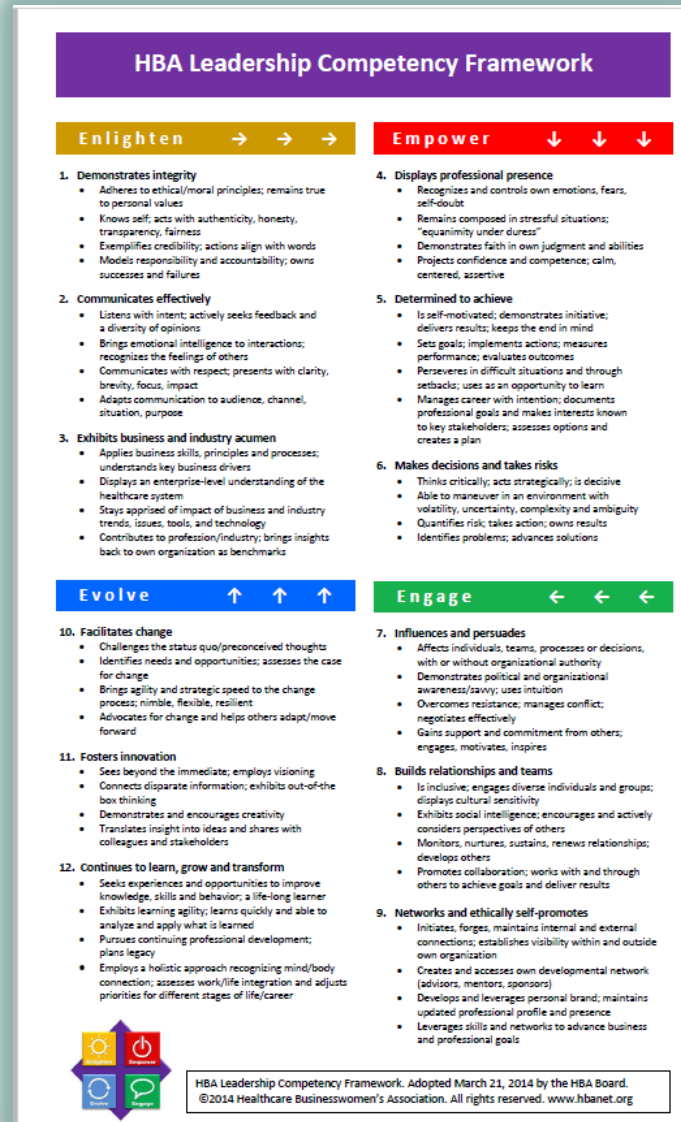




# 11.11 - HBA Leadership Competency Framework (All)

## Section 11

## Forms & Tools: Mentees, Mentors, Circles



## Why competencies for HBA?

To guide and inform HBA programming as well as more tightly align educational offerings and other activities with the knowledge, skills, and behaviors that can make a difference in women's careers.

### ENLIGHTEN

1. Demonstrates integrity
2. Communicates effectively
3. Exhibits business & industry acumen

### EVOLVE

10. Facilitates change
11. Fosters innovation
12. Continues to learn, grow & transform

### EMPOWER

4. Displays professional presence
5. Determined to achieve
6. Makes decisions & takes risks

### ENGAGE

7. Influences & persuades
8. Builds relationships & teams
9. Networks & ethically self-promotes

## Section 12

# Final Surveys

## 12.01 - Email with Link to Final Mentee Survey (US & EU) 12.02 - Email with Link to Final Mentor Survey (US & EU)

### 12.01 - Email Link to Final Mentee Survey (US & EU)

**Recommended Subject Line:**

Final mentee survey - Please complete by [date]

Dear Mentee,

Below is a link to the mentoring program's Final Mentee Survey. We want to better understand your experience in the program as well as share aggregate data from both mentees and mentors at the upcoming Closing Celebration.

Please take this survey by [date] by clicking on this link: [enter Final Mentee Survey link].

This survey is anonymous unless you choose to identify yourself.

Thank you for your feedback; we look forward to your participation in the Closing Celebration.

Warm wishes,  
HBA [Region] Mentoring Program Committee

### 12.02 - Email Link to Final Mentor Survey (US & EU)

**Recommended Subject Line:**

Final mentor survey - Please complete by [date]

Dear Mentor,

Below is a link to the mentoring program's Final Mentor Survey. We want to better understand your experience in the program as well as share aggregate data from both mentors and mentees at the upcoming Closing Celebration.

Please take this survey by [date] by clicking on this link: [enter Final Mentor Survey link].

This survey is anonymous unless you choose to identify yourself.

Thank you for your feedback; we look forward to your participation in the Closing Celebration.

Warm wishes,  
HBA [Region] Mentoring Program Committee



## 12.03 - Email Reminder to Complete Final Mentee Survey (US & EU)

## 12.04 - Email Reminder to Complete Final Mentor Survey (US & EU)

### Section 12

## Final Surveys

#### 12.03 - Email Link to Complete Final Mentee Survey (US & EU)

**Recommended Subject Line:**

Reminder - Complete final mentee survey by [date]

Dear Mentee,

A short note to remind you that if you haven't yet taken the Final Mentee Survey, please do so by [date]. We want to better understand your experience in the program as well as share aggregate data from both mentees and mentors at the upcoming Closing Celebration.

This survey is anonymous unless you choose to identify yourself. Click on this link to take the survey now: [enter Final Mentee Survey link].

If you have already completed the survey, thank you for your feedback.

We look forward to seeing you at the Closing Celebration.

Warm wishes,  
HBA [Region] Mentoring Program Committee

#### 12.04 - Email Link to Complete Final Mentor Survey (US & EU)

**Recommended Subject Line:**

Reminder - Complete final mentor survey by [date]

Dear Mentor,

A short note to remind you that if you haven't yet taken the Final Mentor Survey, please do so by [date]. We want to better understand your experience in the program as well as share aggregate data from both mentors and mentees at the upcoming Closing Celebration.

This survey is anonymous unless you choose to identify yourself. Click on this link to take the survey now: [enter Final Mentor Survey link].

If you have already completed the survey, thank you for your feedback.

We look forward to seeing you at the Closing Celebration.

Warm wishes,  
HBA [Region] Mentoring Program Committee

## Section 12

# Final Surveys

**12.05 - Final Mentee Survey (US)**

**12.06 - Final Mentor Survey (US)**

**Survey Monkey has imposed limitations on account access -**

HBA is exploring how to manage these new restrictions. In the interim, contact HBA Central's Lori Whitehand ([lwhitehand@hbanet.org](mailto:lwhitehand@hbanet.org)) for survey links.

## Section 12

# Final Surveys

**12.07 - Final Mentee Survey (EU)**

**12.08 - Final Mentor Survey (EU)**

**Survey Monkey has imposed limitations on account access -**

HBA is exploring how to manage these new restrictions. In the interim, contact HBA Central's Lori Whitehand ([lwhitehand@hbanet.org](mailto:lwhitehand@hbanet.org)) for survey links.

## 13.01 - CLOSING WEBINAR - Email with Registration Link (US & EU)

### Section 13

# Closing Celebration

#### 13.01 - Closing Webinar - Email with Registration Link (US & EU)

Recommended Subject Line:

Register now - Closing Celebration webinar on [date]

Dear Mentees and Mentors, *((Note: Programs using the New Virtual Kickoff Model may decide to have individual groups meet in person in their own locations for the Closing, just as they did for the Kickoff. Then one person in the group logs into the Closing Webinar and the group watches it together. If this is how the Closing Event will be conducted, please adapt your communications with/directions for participants accordingly.))*

We are delighted to be celebrating the culmination and close of the [year] HBA [region] Mentoring Program via webinar on [day, date] at [time(s) & time zone(s)]. *((Note: If program participants are from multiple time zones, recommend listing all major times & time zones.))* During this session, we look forward to sharing successes and hearing your stories. We'll also explore ways to leverage what you've learned and build on the connections you've made as you move forward in your career journey.

This session will be held as a webinar, and **you must register for it by clicking on this link** [insert Attendee link to the Closing webinar] and providing the requested information. Once you do, you will receive your personal webinar access information (link and phone number) by return email. Register now, so you'll be ready to login to the program and receive reminders about this event from the HBA Education Department webinar platform.

We look forward to connecting with you soon!

Warm wishes,

Mentoring Program Committee  
HBA [Region]

### For Closing webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to the Closing webinar.
- Programs using the New Virtual Kickoff Model may decide to have individual groups meet in person in their own locations for the Closing, just as they did for the Kickoff. Then one person in the group logs into the Closing Webinar and the group watches it together. If this is how the Closing Event will be conducted, please adapt your communications with/directions for participants accordingly.

## 13.02 - CLOSING WEBINAR - EMAIL REMINDER TO REGISTER (US & EU)

### Section 13

# Closing Celebration

#### 13.02 - Closing Webinar - Email Reminder to Register (US & EU)

Recommended Subject Line:

Reminder - You still need to register for the Closing webinar on [date]

Dear \_\_\_\_\_, *((Send to those who have not yet registered. Note: Programs using the New Virtual Kickoff Model may decide to have individual groups meet in person in their own locations for the Closing, just as they did for the Kickoff. Then one person in the group logs into the Closing Webinar and the group watches it together. If this is how the Closing Event will be conducted, please adapt your communications with/directions for participants accordingly.))*

You still need to register for the Closing webinar, which will be broadcast live on [day, date] at [time(s) & time zone(s)]. *((Note: If program participants are from multiple time zones, recommend listing all major times & time zones.))*

Click here to register: [insert Attendee link to the Closing webinar]. Once you do, you will receive your personal webinar access information (link and phone number) by return email.

We look forward to connecting with you soon!

Warm wishes,

Mentoring Program Committee

HBA [Region]

|

### For Closing webinar

- Send from your mentoring program's email account.
- Review & customize with your program's information
- Include Attendee registration link to the Closing webinar.
- Send to those who still haven't registered.

## 13.03 - FACE-TO-FACE CLOSING - Final Reminder & Meeting Confirmation (US)

### Section 13

# Closing Celebration

#### 13.03 - F2F Closing - Final Reminder & Meeting Confirmation (US)

[year] HBA [region] Mentoring Program Closing Celebration  
[day, date]  
[start time - end time]

Dear Mentoring Colleagues,

We're looking forward to seeing you at the [date] Closing Celebration for the [year] HBA [region] Mentoring Program. This is your final reminder/meeting confirmation, which includes a summary of important information.

**Date/Time**  
[day, date]  
[start time - end time]

- Registration opens at [time]. Don't miss the opportunity to network with mentoring program participants and committee members before the program starts. Bring your business cards!
- Dinner is from [start time - end time].
- The formal program will begin promptly at [time].

**Place**  
[company/venue name]  
[street address]  
[city, state, zip]  
[company/venue phone number]

**Meeting Location**  
[building number, floor number, room number]

**Note:** Photo ID required to be admitted to the building. ((delete if not applicable))

#### Directions, Parking, Other Information

1. Directions: ((add directions here or attach))
2. Parking: ((add parking information here or attach; delete if not applicable))
3. Construction/Traffic Advisory: ((add any construction/traffic information here; delete if not applicable))
4. ((add any other information/instructions for this meeting here))

**Mentoring Program Committee - Emergency Contact Number (Day of Meeting)**  
[name] - [cell phone number]

If you have any questions prior to the Closing Celebration, please do not hesitate to reach out to us at [mentoring program email address].

We look forward to a special evening of learning, recognition, and celebration!

Warm wishes,

Mentoring Program Committee  
HBA [region]

### For Face-to-Face (F2F) Closing Meeting of All Groups Together in One Location (usually at a sponsored venue)

- Use this template to send out a final reminder & meeting confirmation to all mentors & mentees several days before the Closing Celebration.
- Review & customize with your program's information & instructions.
- Send from your mentoring program's email account.

# Section 13

## Closing Celebration

- See notes within slide deck.



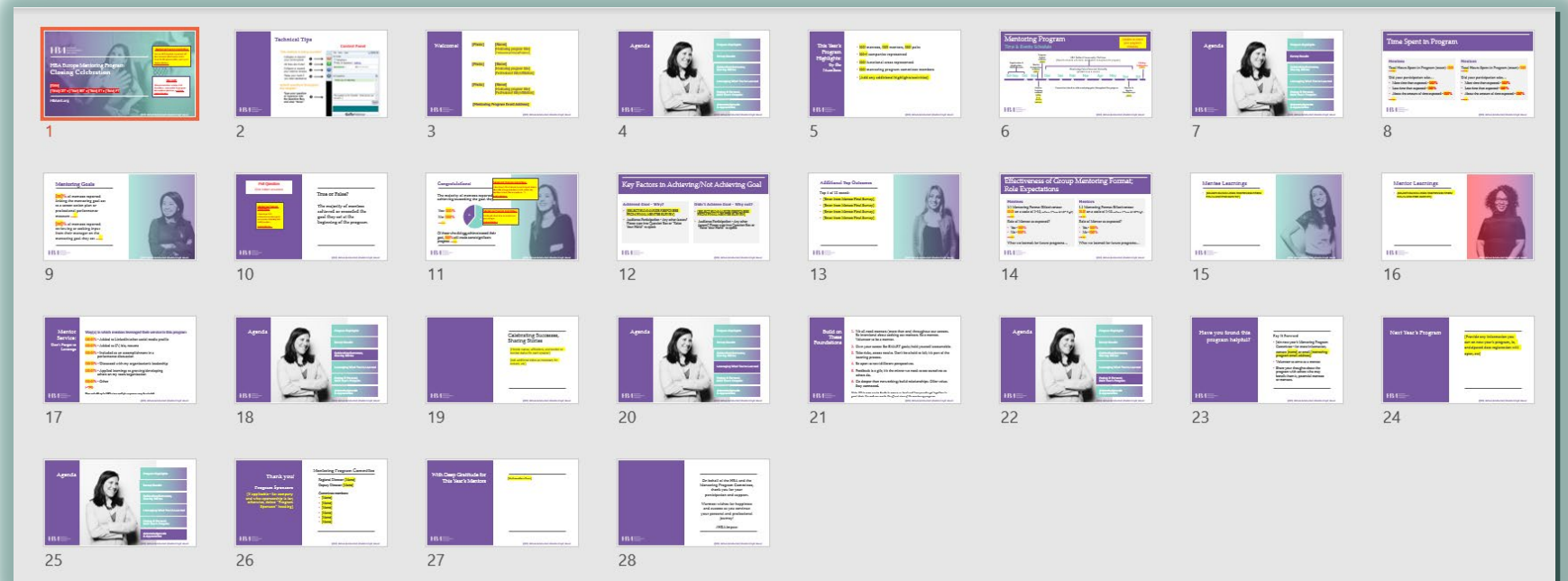
# 13.05 - CLOSING WEBINAR - Slides (EU)

## Section 13

# Closing Celebration

**Complete slide deck (28 slides) for Closing Celebration webinar (1:1 program)**

- See notes within slide deck.





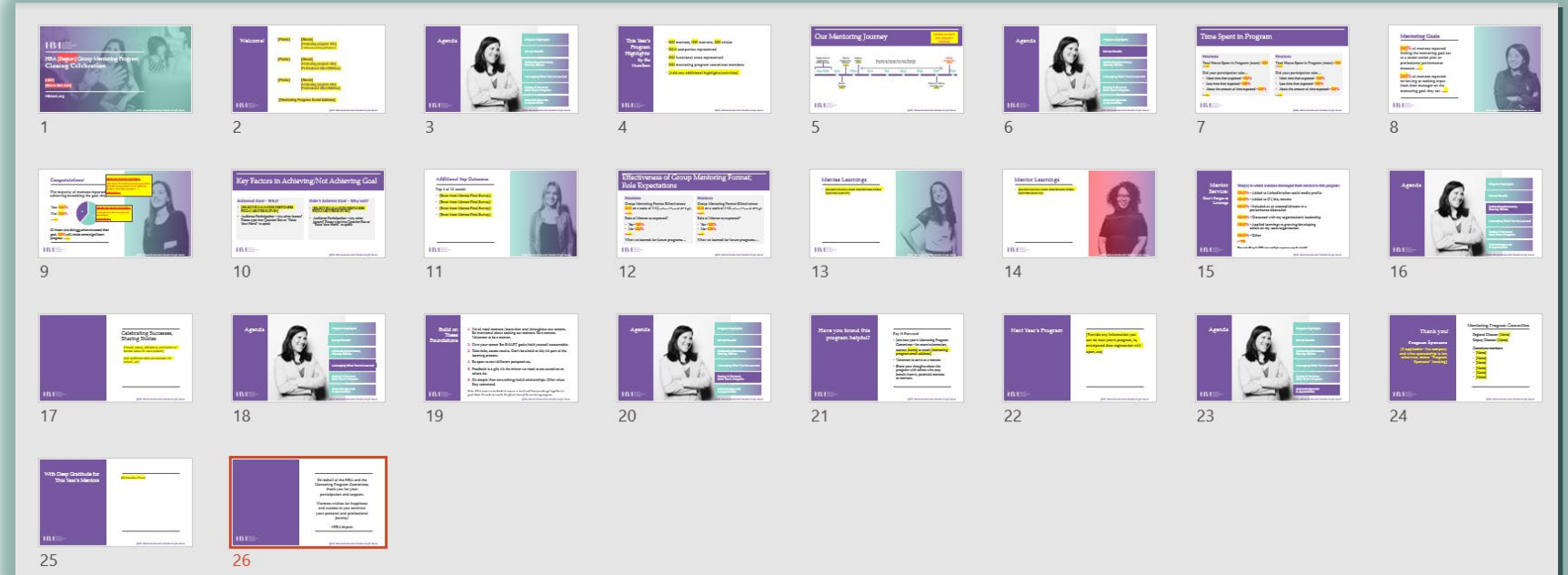
# 13.06 - FACE-TO-FACE CLOSING MEETING - Slides (US)

## Section 13

# Closing Celebration

## Complete slide deck (26 slides) for Face-to-Face Closing Celebration Meeting (group mentoring programs)

- See notes within slide deck.



# 13.07 - CERTIFICATES - Mentee, Mentor, Committee (US)

## Section 13

# Closing Celebration

### Certificate of Completion for Mentees



### Certificate of Appreciation for Committee members



### Certificate of Recognition for Mentors

# 13.08 - CERTIFICATES - Mentee, Mentor, Committee (EU)

## Section 13

# Closing Celebration

### Certificate of Recognition for Mentors



served as a Mentor in the  
[year] HBA Europe Mentoring Prog

Presented on [date]

[Name]  
Director

[Name]  
Deputy Direct

### Certificate of Completion

[Name]

participated as a Mentee in the  
[year-year] HBA Europe Mentoring Program.

Presented on [date]

[Name]  
Mentoring Director

[Name]  
Deputy Director

### Certificate of Appreciation

[Name]

served as a member of the Mentoring Program Committee in the  
[year] HBA [Region Name] Group Mentoring Program.

Presented on [date]

[Name]  
Mentoring Director

[Name]  
Deputy Director

### Certificate of Completion for Mentees

### Certificate of Appreciation for Committee members

## Acknowledgments

The resources identified in this guide represent the experience and wisdom of many dedicated HBA volunteers and mentoring program participants including mentors, mentees, regional mentoring program directors, mentoring program committees, HBA staff and others.

The HBA wishes to thank the individuals, chapters and regions who shared these materials and resources. If there are additional nonproprietary materials you feel would be helpful to include in a future edition of this directory, contact [mentoring@hbanet.org](mailto:mentoring@hbanet.org).

Deep appreciation is extended to members of the Mentoring Resources Task Force, Wendy Mantel, Brenda Fung and Lynn Paolicelli, whose initial work in gathering, reviewing, assessing, synthesizing, consolidating and collating a wealth of contributed materials was foundational to the first edition of this guide.

*This deck was initially created and compiled by Liz Stueck, former Senior Director, Education and Programs, HBA.*