PMCDP Mentoring Agreement

# Mentor and Mentee Contact Information

|  |  |  |  |
| --- | --- | --- | --- |
| Name | FPD Level | Email | Duty Station |
| **INSERT NAME**  *****Mentor***** | X | INSERT E-MAIL | INSERT DUTY STA |
| **INSERT NAME**  *****Mentee***** | X | INSERT E-MAIL | INSERT DUTY STA |

# General Information

## Purpose

The PMCDP's Certification and Equivalency Guidelines document provides information on the developmental, experiential, training, and mentoring activities required for the different levels of certification in accordance with [DOE Order 361.1C, *Acquisition Career Management Program*](https://www.directives.doe.gov/directives-documents/300-series/0361.1-BOrder-C) (Chapter V). A minimum of six months of documented experience being formally mentored by a Level III or IV FPD who has a minimum of two years’ experience on a Level III or higher project.

This mentoring agreement must be signed by the FPD candidate and the mentor and include at a minimum, the goals, activities, and duration to support the six-month FTE requirement, and documentation that the mentoring was successfully completed. A signed copy of the agreement must be submitted with the PMCDP application. These are requirements per the PMCDP Certification and Equivalency Guidelines which is available on PM-MAX.

## Expectations

Mentoring provides access to an experienced FPD who can provide guidance and advice in an informal, non-supervisory setting. It is expected that the mentor and mentee will be engaged continuous communication and will diligently work towards satisfying the goals of this Mentoring Agreement.

This Mentoring Agreement will specify:

* Professional Development Goals (e.g., what the mentee hopes to achieve as a result of this relationship) (**PMCDP requirement).**
* Steps to Achieving Goals (**PMCDP requirement)**
* Confidentiality
* Plan for Evaluating Relationship Effectiveness (**PMCDP requirement)**
* Relationship Termination Clause
* Responsibility for cost to implement Mentoring Plan

# Mentoring Agreement Plan

## Professional Development Goals

Identifying key professional development goals which will be the foundation for a successful mentorship are critical. Additionally, articulating a strategy for reaching those goals is just as important. Below are the mentorship development goals and initial strategies for meeting those goals. During the mentorship, the parties may agree to add or delete goals and modify the strategies being implemented to achieve those goals. The documentation produced by the mentor and mentee at the conclusion of the mentorship period will outline the final mentorship goals, the strategies used to achieve those goals, and the results obtained.

|  |  |
| --- | --- |
| Developmental Goal | Initial Strategy for Achieving Goal |
| Gain perspective relative to the skills necessary for success as a Level 3 and Level 4 FPD | * Mentee to continue to attend PMCDP training for Level 3 and 4 certification * Mentee to work towards Level 3 FAC-COR certification * Mentee will shadow mentor during project and program meetings * Mentee will attend project reviews which the mentor attends * Formal mentoring interactions to be held * Informal mentoring interactions will be pursued multiple times per week |
| Improve skills in Leadership and Executive Communication | * Mentee to attend PMCDP courses: Executive Communications, Facilitating Conflict Resolution, and Negotiation Strategies and Techniques * Mentee will shadow mentor during project and program meetings |
| Further develop understanding of project management and execution | * Mentee to continue to attend PMCDP training for Level 3 and 4 certification * Mentee will shadow mentor during project and program meetings * Mentee will attend project reviews which the mentor attends * If possible, mentee to be assigned as Deputy FPD on project which mentor is Primary FPD |
| Obtain additional knowledge of organizational culture | * Mentee will attend project reviews which the mentor attends * Mentee will shadow mentor during meetings with program office and DOE HQ, when appropriate * Mentee to participate in project reviews when requested by OPA |
| Strengthen existing professional relationships and develop new relationships | * Mentee will shadow mentor during project and program meetings * Mentee will attend project reviews which the mentor attends * Mentee to participate in project reviews when requested by OPA |

## Steps to Achieving Goals (PMCDP requirement)

* Overall Mentorship Agreement duration
  + At least Six (6) months full-time equivalent (FTE) (**PMCDP requirement**)
  + Start Date:
    - XXXXX
  + End Date:
    - XXXXX
* Formal mentoring interactions
  + Meeting frequency
    - Once per week, recurring meeting
  + Meeting duration
    - One (1) hour
  + Forum for discussion (e.g., virtual, in-person)
    - In-person is preferred unless either party is unable to meet for whatever reason, then the discussion will be conducted virtually (ZOOM, MS Teams)
* Informal mentoring interaction
  + The mentor and mentee will make an effort to “touch base” with each other outside of the formal mentorship interactions (as outlined above) several times a week.
  + Informal interactions will consist of:
    - Ad-hoc conversations regarding ongoing projects
    - Mentor providing advice or counsel to mentee regarding new guidance, policy, etc.
    - Mentee requesting assistance from the mentor on any issue
* Mentee participation in projects
  + The mentor will invite the mentee to participate in various project meetings, reviews, discussions etc. that will further the mentee’s developmental goals, as outlined in the table on page 2
  + The mentor will discuss with the mentee communication strategies and project management skills which are utilized on the projects the mentee is observing. This will be a two-way dialogue where the mentee can ask questions to the mentor to further enhance the mentee’s learning.
* Project alignment
  + Ideally, the mentor and mentee will be assigned to a project together. The mentor will be the Primary FPD and the mentee will be the Deputy FPD.
  + This is not required and may not be possible given current project workload and FPD assignments. Project alignment will be at the discretion of the MIPD Director.

## Confidentiality

* Formalize how sensitive issues and discussions will remain confidential
  + All discussions held during formal mentoring sessions (i.e., Formal interactions) are considered confidential and both the mentor and mentee agree to not divulge the content of these interactions with others.
  + There will be no recorded minutes of the formal mentoring sessions. The mentee may take personal notes of the discussions for future personal reference. These notes may not be shared.
  + The mentor and mentee may agree to discuss or divulge the contents of a formal mentoring sessions with others. This will be agreed to between the mentor and mentee during the formal mentoring session (bi-lateral agreement).
* Identify topics which are “off limits”
  + Mentorship requires both the mentor and mentee to be able to discuss a wide range of topics, however being considerate of each other’s personal privacy is considered essential to maintain a strong relationship. Therefore, the mentor and mentee agree not to discuss personal topics unless both parties agree (bi-lateral agreement).
  + Confidential human resources information, supervisory information, sensitive but unclassified information, and classified information will not be discussed.

## Plan for Evaluating Relationship Effectiveness

* Success in achieving goals
  + Initial strategies for achieving the mentee’s developmental goals are outlined in this agreement. However, these strategies may have changed during the mentorship period.
  + Success in achieving goals is largely based on the mentee’s perspective at the end of the mentorship. Given the fact mentorship is based on mostly verbal communications between the mentor and mentee, there is a subjective nature to evaluating success.
* De-brief at end of Mentorship
  + The mentor and the mentee will conduct a de-brief at the end of the mentorship. During the de-brief, the mentee’s progress towards achieving the goals set forth in the Mentoring Plan will be discussed. Further, the mentee will discuss from their perspective how successful the overall mentorship was for their career development. This will be an open and frank conversation.
  + The de-brief will remain confidential and meeting minutes will not be taken.
* Documentation that mentoring was successful (**PMCDP requirement**)
  + The mentor will evaluate the mentee’s progress towards the developmental goals. Given the mentor’s experience as a Level 3/4 FPD, their evaluation will be valuable feedback for the mentee. Use Appendix A.
  + The mentee will provide a self-assessment of their progress towards the developmental goals. Use Appendix B.
  + Both the mentor and mentee will fill out the attached forms (Appendix A and B). These forms will serve as documentation that mentoring was successful. The documentation will be submitted with the mentee’s Level 3 FPD package.

## Relationship Termination Clause

1. In the event that circumstances prevent the relationship from continuing (i.e, one party gets a new job), the mentoring agreement may be terminated, by either the mentor or mentee.

Given the requirements set forth in the PMCDP Certification and Equivalency Guidelines document, if the mentorship does not last at least six (6) months FTE, then it is considered insufficient with respect to satisfying the requirements for Level 3 FPD certification. In this situation, the parties agree to document that the mentoring performed to-date was successful so that this time can be considered creditable for Level 3 FPD certification.

1. In the event that either party finds the mentoring relationship unproductive and requests that it be terminated, both the mentor and mentee agree to honor that individual’s decision without question or blame. In this situation, none of the time spent in the mentorship will be considered creditable for Level 3 FPD certification.

## Cost of Implementation of the Mentoring Plan

While it is expected there will be no additional costs associated with implementing the Mentoring Plan (beyond normal labor costs), any additional costs associated with implementation of this Mentoring Plan will be considered training costs and will be the responsibility of the mentee’s Site Office.

# Mentoring Agreement Signature Page

Our signatures on this page indicate full understanding of, and agreement with, the PMCDP Mentoring Plan. Both the mentor and mentee agree to provide their full commitment to the successful implementation of the Mentoring Agreement and Plan for the duration specified in the Plan.

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INSERT NAME

DOE Certified FPD Level X

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INSERT NAME

DOE Certified FPD Level X

PMCDP Mentoring Agreement – Appendix A

Mentor Evaluation

# Purpose

The PMCDP's Certification and Equivalency Guidelines document provides information on the developmental, experiential, training, and mentoring activities required for the different levels of certification in accordance with [DOE Order 361.1C, *Acquisition Career Management Program*](https://www.directives.doe.gov/directives-documents/300-series/0361.1-BOrder-C) (Chapter V). A minimum of six months of documented experience being formally mentored by a Level III or IV FPD who has a minimum of two years’ experience on a Level III or higher project.

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| **INSERT NAME**  *****Mentee***** | X | INSERT E-MAIL | INSERT DUTY STA |

# Mentor’s Evaluation – Executive Summary

*Mentor will provide a paragraph summary of the mentorship and indicate if the mentorship was successful (or not).*

*Space reserved for Executive Summary*

# Mentee Professional Development Goals

|  |  |
| --- | --- |
| Developmental Goal | Mentor’s Evaluation |
| Gain perspective relative to the skills necessary for success as a Level 3 and Level 4 FPD | *Mentor will insert their evaluation of the mentee’s development during the mentorship with respect to the Developmental Goal* |
| Improve skills in Leadership and Executive Communication | *Insert evaluation* |
| Further develop understanding of project management and execution | *Insert evaluation* |
| Obtain additional knowledge of organizational culture | *Insert evaluation* |
| Strengthen existing professional relationships and develop new relationships | *Insert evaluation* |

# Mentee Significant Accomplishments

* List out mentee’s significant accomplishments during the mentorship period. Examples:
  + Serves as FPD (Primary or Deputy) on XXX project
  + Completed all Level 3 FPD training requirements
  + Regular participation in XXX project meetings, reviews, etc.
  + Participated in Critical Decision XX review for XXX project

# Total Estimated Mentorship Contact Hours: 96 hours

*Mentee may request CLPs at the conclusion of the mentorship. Both the Mentoring Plan and Evaluations shall be sent to the PMCDP Program Office when claiming CLPs.*

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INSERT NAME

DOE Certified FPD Level X

PMCDP Mentoring Agreement – Appendix B

Mentee Self-Evaluation

# Purpose

The PMCDP's Certification and Equivalency Guidelines document provides information on the developmental, experiential, training, and mentoring activities required for the different levels of certification in accordance with [DOE Order 361.1C, *Acquisition Career Management Program*](https://www.directives.doe.gov/directives-documents/300-series/0361.1-BOrder-C) (Chapter V). A minimum of six months of documented experience being formally mentored by a Level III or IV FPD who has a minimum of two years’ experience on a Level III or higher project.

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| **INSERT NAME**  *****Mentee***** | X | INSERT E-MAIL | INSERT DUTY STA |

# Mentee’s Self-Evaluation – Executive Summary

*Mentee will provide a paragraph summary of the mentorship and indicate if the mentorship was successful (or not).*

*Space reserved for Executive Summary*

# Mentee Professional Development Goals

|  |  |
| --- | --- |
| Developmental Goal | Mentee’s Self-Evaluation |
| Gain perspective relative to the skills necessary for success as a Level 3 and Level 4 FPD | *Mentee will insert their self-evaluation of their development during the mentorship with respect to the Developmental Goal* |
| Improve skills in Leadership and Executive Communication | *Insert evaluation* |
| Further develop understanding of project management and execution | *Insert evaluation* |
| Obtain additional knowledge of organizational culture | *Insert evaluation* |
| Strengthen existing professional relationships and develop new relationships | *Insert evaluation* |

# Mentee Significant Accomplishments

* List out mentee’s significant accomplishments during the mentorship period. Examples:
  + Serves as FPD (Primary or Deputy) on XXX project
  + Completed all Level 3 FPD training requirements
  + Regular participation in XXX project meetings, reviews, etc.
  + Participated in Critical Decision XX review for XXX project

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INSERT NAME

DOE Certified FPD Level X