



SITE Mentorship Program Guide

This document details the guidelines to the mentorship program offered to SITE members.

2/18/2019

Contents

- Program Definition..... 2
- Program Guidelines..... 3
- Program Benefits 4
 - Mentee Benefits 4
 - Mentor Benefits..... 4
 - Participating Organization Benefits 4
- Program Administration 4
- Program Flowchart..... 4
- Roles and Responsibilities..... 5
- Program Documents 6
- Program Implementation 6
- Appendix 7
 - Mentor Application..... 7
 - Mentee Application 10
 - Mentorship Program Orientation Outline 13
 - Mentorship Plan Template 14
 - Program Evaluation Form 15
 - Mentee Evaluation Form (Mentee evaluating the mentor) 15
 - Mentor Evaluation Form (Mentor evaluating mentee) 16

Section 1: Program Overview

Program Definition

The Mentorship Program is an initiative to connect SITE members with other highly motivated members who seek careers, career advancement and professional development in the insurance and training related industry. The goal of the Mentorship Program is to connect each mentee with a mentor (current SITE member) with the purpose of adding value and direction to the mentee's experience with SITE. Mentors who wish to be paired with more than one mentee are able to do so; however, the Mentorship Program committee will only pair each mentor with one mentee unless the mentor confirms a willingness to work with additional mentees.

The mentorship program at SITE will be:

1. Administered in a three-month (12 weeks) time frame
2. An ongoing dialogue of progress and lesson learned between both parties
3. Focused on developing competencies in the following areas:

A. SITE Train the Trainer competencies

- I. Application of adult learning fundamentals
- II. Training needs analysis
- III. Instructional design
- IV. Training delivery
- V. Training evaluation

B. Leadership competencies

- I. Organizational skills
 - a. Building vision and strategy
 - b. Change management
 - c. Project management
- II. Team Development
 - a. Developing Emotional intelligence
 - b. Effective communication skills
 - c. Employee development
 - Coaching
 - Mentoring
 - d. Motivating others

C. Learning Technologies Application

- i. Virtual Reality/Augmented Reality
- ii. Adaptive Learning
- iii. Developing Online Courses
- iv. Developing Game Based Learning
- v. Virtual Facilitation

D. eLearning Creation

- i. Adobe Captivate
- ii. Articulate Storyline
- iii. Lectora Inspire
- iv. Camtasia

Do you have an area you'd like to grow professionally that is not listed? Please e-mail office@insurancetrainers.org with your growth opportunity and we will reach out to our mentors to see if we can match your requested growth area with their expertise.

The SITE mentorship program is **not** a job placement program.

Program Guidelines

The mentorship program at SITE is designed to support the competencies focused in the SITE Train the Trainer program. The program supports SITE's mission statement of providing SITE member professional development through programs, networking opportunities, and services. All members interested in participating in the program must complete an application form. A sample of all program documents can be found in the Appendix of this manual.

The success criteria of the program will be based on:

1. Mentee receiving positive feedback on their performance of the mentored skill at work.
2. The mentor or mentee recommending the program to other SITE members.
3. Mentee willing to be a mentor in subsequent programs on similar topic.
4. 5% of SITE's membership enrolled in the program annually

The SITE mentorship program is based on the foundation that both parties:

- Will be respectful of each other
- Communicate in an open and honest manner
- Set clear expectations
- Will not disclose confidential or proprietary information related to their employment

All communications between mentors and mentees are private, though not confidential or privileged. Discussions that violate SITE's antitrust policies are not permitted and are grounds for dismissal from the program.

Program Benefits

Mentee Benefits

- Identify personal strengths and weaknesses
- Acquire job knowledge to help develop specific skills and traits to increase competency
- Obtain career advice for short- and long-term planning
- Set goals and receive guidance toward attainment
- Get practical answers to questions about job and career
- Obtain resources to support job and career
- Acquire opportunities to expand a business network

Mentor Benefits

- Share, discuss, and test ideas and theories with a different perspective
- Transfer knowledge to an eager recipient
- Create a legacy in the industry
- Develop qualified, competent individuals in the industry
- Expand business network connections
- Enhance business credentials

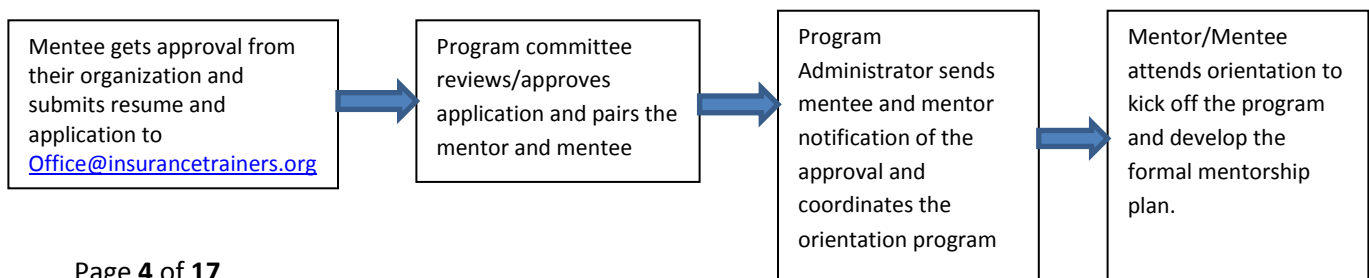
Participating Organization Benefits

- Increase competitive advantage in the insurance industry with skilled talents in the training sector
- Employees participating in the SITE's mentorship program being more engaged, motivated, and invested in their professional development.

Program Administration

The program will be administered by the SITE's Mentorship committee. It will be launched for a three-month period every quarter. At the end of the program all mentees/mentors will receive a certificate post their program and they will be recognized in a ceremony at the annual conference. The program flowchart provides step by step instructions on the program workflow. The program committee will maintain the mentor database. All members interested in participating as a mentor or mentee will need to submit an application (sample in Appendix section) and resume within the registration deadline. Applications should be emailed to Office@insurancetrainers.org.

Program Flowchart



Roles and Responsibilities

ROLES	RESPONSIBILITIES
Program Committee	<ul style="list-style-type: none"> • Ensure the mentoring program is created and sustained • Pair mentor and mentee using factors such as areas of interest, insurance field (personal lines, commercial lines, life, health, etc.), and career goals into consideration • Align goals and objectives for the mentoring program with SITE's vision • Commit resources to train and coach participants • Annually audit the program to realign and improve framework based on SITE's strategy and participant feedback • Report to SITE's Board on the program progress
Program Administrator	<ul style="list-style-type: none"> • Manage the application process • Maintain the application repository • Maintain the mentor database • Member of program committee
Mentor	<ul style="list-style-type: none"> • Work with the mentee in developing the mentorship plan • Ensure mentee work projects have set start and end dates, and do not distract from the mentee's official work duties • Meet routinely with the mentee to discuss and monitor progress • Provide ongoing feedback and recommendations to the mentee • Offer advice on career options and fields of interest • Share experiences regarding the realities of the insurance and training profession • Engages in discussion about professional associations within their industry • Provides guidance and support through the process of researching books, conferences, or designations that would benefit the mentee throughout their career • Discuss networking and how to make it work most effectively for the mentee • Gives consultation on resumes, cover letters and ways to approach new career opportunities • Celebrate successes

Mentee	<ul style="list-style-type: none"> • Take ownership of the mentorship plan • Send meeting invites to meet routinely with the mentor • Complete tasks or projects associated with the program by set deadlines • Be accountable for your actions • Commit 100% to the program • Actively participate in mentoring activities and goal accomplishment • Have open and honest discussions with the mentor • Partner with the mentor in a professional manner for successful completion of the program • Be respectful and show appreciation for the mentor's time
--------	---

Program Documents

The following program documents support the process for potential mentees and mentors, to implement, evaluate and continuously improve the mentoring program. Please refer to the Appendix for the program forms.

- **Application Form:** Mentees and mentors apply to participate in the mentorship program by completing an application form.
- **Mentorship Plan:** The mentorship plan details the goal, expectations, and activities to accomplish the goal.
- **Mentorship Log:** The mentee and mentor record their meetings and activities to show progress achieved and assist with end-of-program evaluation.
- **Evaluation:** At the end of the program, mentees and mentors evaluate their program experience to assist with continuous improvements of the program.

Program Implementation

The program will be initially launched as a pilot to a limited number of members who have completed their Train the Trainer certification with SITE. The pilot program will be used to:

- Gauge the program interest
- Refine the guidelines using feedback from the pilot

The Pilot program will be administered for a three-month period from March 2019-June 2019. The program will be formally introduced at the SITE Annual Conference in June 2019.

Appendix

Mentor Application

Name:

Title:

Company:

Contact Information:

Supervisor Approval: Yes ____ No ____

COMPETENCIES CATEGORIES

Please select the Competencies you are interested in mentoring.

1. SITE Train the Trainer competencies

- Application of adult learning fundamentals
- Training needs analysis
- Instructional design
- Training delivery
- Training evaluation

2. Leadership competencies

- Organizational skills
 - Building vision and strategy
 - Change management
 - Project management
- Team Development
 - Developing Emotional intelligence
 - Effective communication skills
 - Employee development
 - Coaching
 - Mentoring
 - Motivating others

3. Learning Technologies Application

- Virtual Reality/Augmented Reality
- Adaptive Learning
- Developing Online Courses
- Developing Game Based Learning
- Virtual Facilitation

4. eLearning Creation

- Adobe Captivate
- Articulate Storyline
- Lectora Inspire
- Camtasia

5. Other

Please specify if there are other competencies you are interested in mentoring that is not listed above.

COMPETENCIES EXPERIENCE

Please provide a short summary of your level of experience providing examples for the competencies selected in the previous section.

MENTOR OBJECTIVE

Why do you want to participate as a mentor in SITE's mentorship program?

Have you had any previous experience in mentoring programs? If yes please elaborate.

MENTORSHIP PROGRAM TERMS AND CONDITIONS

By completing this application form, you ask for SITE to consider you as a potential mentor in the SITE mentorship program. In exchange for this consideration as a potential mentor, you agree:

- To the goals and purposes of the mentorship program;
- To release, hold harmless, and indemnify SITE and its officers, directors, employees, contractors, and assigns, from all claims, judgements, demands, liabilities, and actions that arise from or out of your participation in the mentorship program;
- That your participation in the mentorship program is voluntary, for the purposes stated herein, and not conditioned upon an expectation of benefits or advantages beyond those stated herein;
-
- To avoid the disclosure of proprietary or confidential information pertaining to your employment or that of the mentee;
- To abide by SITE's Antitrust Policy; and
- That all statements in this application are accurate to the best of your knowledge

I agree with the above terms and conditions of the Mentorship Program.

Signature _____

Date _____

Mentee Application

Name:

Title:

Company:

Contact Information:

Supervisor Approval: Yes _____ No _____

COMPETENCIES CATEGORY

Please select one Training Competency you would like to develop through the mentorship program.

6. SITE Train the Trainer competencies

- Application of adult learning fundamentals
- Training needs analysis
- Instructional design
- Training delivery
- Training evaluation

7. Leadership competencies

- Organizational skills
 - Building vision and strategy
 - Change management
 - Project management
- Team Development
 - Developing Emotional intelligence
 - Effective communication skills
 - Employee development
 - Coaching
 - Mentoring
 - Motivating others

8. Learning Technologies Application

- Virtual Reality/Augmented Reality

- Adaptive Learning
- Developing Online Courses
- Developing Game Based Learning
- Virtual Facilitation

9. eLearning Creation

- Adobe Captivate
- Articulate Storyline
- Lectora Inspire
- Camtasia

10. Other

Please specify if there are other competencies you are interested in mentoring that is not listed above.

MENTEE OBJECTIVE

Please provide a short summary of your current level of experience with examples of the competency selected and how you would like to improve this skill.

Why do you want to participate as a mentee in SITE mentorship program?

How will this mentorship program help you with your career goals?

What would you like your mentor to help you achieve/learn?

Please describe briefly the skills you will bring to the mentorship program that will add value to your mentor.

Describe briefly the skills you are looking for in your mentor.

MENTORSHIP PROGRAM TERMS AND CONDITIONS

By completing this application form, you ask for SITE to consider you as a potential mentor in the SITE mentorship program. In exchange for this consideration as a potential mentor, you agree:

- To the goals and purposes of the mentorship program;
- To release, hold harmless, and indemnify SITE and its officers, directors, employees, contractors, and assigns, from all claims, judgements, demands, liabilities, and actions that arise from or out of your participation in the mentorship program;
- That your participation in the mentorship program is voluntary, for the purposes stated herein, and not conditioned upon an expectation of benefits or advantages beyond those stated herein;
- To avoid the disclosure of proprietary or confidential information pertaining to your employment or that of the mentee;
- To abide by SITE's Antitrust Policy; and
- That all statements in this application are accurate to the best of your knowledge

I agree with the above terms and conditions of the Mentorship Program.

Signature _____

Date _____

Mentorship Program Orientation Outline

The orientation will be a joint session of the mentors and mentees enrolled in the session. The session will be conducted live through a virtual webinar and will be facilitated by a member of the SITE Mentorship program committee. The orientation will be conducted as a part of the program kick off. The objective of the orientation is to provide the participants with clear expectations of the program. The one-hour orientation will cover the following topics:

- SITE Mentorship program objective
- Mentor responsibilities
- Mentee responsibilities
- Mentoring Plan: Mentor/Mentee will:
 - Share the mentorship goal that was set prior to the orientation
- Network and meet the other mentor/mentees in the same 3 month program

Pre-Orientation tasks:

- Program Administrator will send the mentor and mentee the welcome email with the completed application of both parties
- The mentor and mentee will schedule a phone call to formally introduce themselves to the other party
- Both parties will also discuss the mentorship goal that they will commit to after the orientation

Mentorship Plan Template

Mentor	Mentee
Name:	Name:
Company:	Company:
Title:	Title:
Contact:	Contact:
Program start date:	Program end date:

Mentorship Goal

Sample Meeting Topics

MEETING DATE	AGENDA	COMPLETED DATE
Meeting 1	Discuss expectation for the relationship; including meeting dates and frequency. Mentee to select agenda for next meeting date.	
Meeting 2	Mentee defined agenda	
Meeting 3	Mentee defined agenda	
Meeting 4	Mentee defined agenda	
Meeting 5	Mentee defined agenda	
Meeting 6	Mentee defined agenda	

Post Program Activities

(To be completed by mentee at the last meeting)

ACTIVITY	START DATE	COMPLETED DATE	MEASURE OF SUCCESS

Program Evaluation Form

Mentee Evaluation Form (Mentee evaluating the mentor)

Mentee Name:

Mentor Name:

Program Start date:

Program End Date:

Competency Selected:

QUESTION	STRONGLY DISAGREE (1)	DISAGREE (2)	AGREE (3)	STRONGLY DISAGREE (4)
My mentor provided me guidance and support to meet my mentorship plan				
My mentor was knowledgeable on the competency I wanted to work on				
My mentor demonstrated commitment to the mentoring plan				
My mentor provided me open and honest feedback on my development and progress				
My mentor was accessible and available throughout the program				
My mentor was very professional throughout the program				
I would highly recommend this mentor to other mentees interested in a similar development plan				
The mentoring program met my career plan expectations				

Please provide your comments:

1. How did the mentorship program help you with your career goals?
2. What skills did you enhance in the mentorship program?
3. How do you plan to continue to use the skills from the mentorship program?
4. Will you be willing to be a mentor for this skill in the future? Please elaborate on your response.

Yes, I will be a mentor because _____

No, I will not be a mentor because _____

5. How can we improve this program for future participants?

Mentor Evaluation Form (Mentor evaluating mentee)

Mentor Name:

Mentee Name:

Program Start date:

Program End Date:

QUESTION	STRONGLY DISAGREE (1)	DISAGREE (2)	AGREE (3)	STRONGLY DISAGREE (4)
My mentee demonstrated commitment to the mentoring plan				
My mentee was accountable for their mentorship plan				
My mentee was open to honest feedback on their development and progress				
My mentee was punctual to the meetings				
My mentee was accessible and available throughout the program				
My mentee was very professional and respectful throughout the program				
My mentee regularly completed their development action items prior to the meetings				
My mentee contributed ideas for their development activities				
I recommend this mentee as a mentor? for future mentorship programs				

Please provide your comments:

6. How did the mentorship program benefit you as a mentor?
7. What did you learn from the mentorship program?
8. Did you have a collaborative relationship with your mentee? Please elaborate on your response.
Yes, I had a collaborative relationship with my mentee because _____
No, I did not have a collaborative relationship with my mentee because _____
9. What were the two most beneficial activities you did with your mentee and why?
10. What was the most beneficial change you noticed in your mentee as a result of the mentorship program?
11. Will you be willing to recommend this mentee as the mentor for this skill in the future? Please elaborate on your response.
Yes, I will recommend because _____
No, I will not recommend because _____
12. How can we improve this program for future participants?

SITE Antitrust Policy

It shall be the policy of SITE (“the Society”) to be in strict compliance with all Federal and State Antitrust laws, rules and regulations. Therefore:

- I. This policy applies to all membership, board, committee and other meetings of the Society, and all meetings attended by representatives of the Society.
- II. Discussions of prices or price levels are prohibited. In addition, no discussion is permitted of any elements of a company's operations which might influence price such as: a. Cost of operations, supplies, labor or services; b. Allowance for discounts; c. Terms of sale including credit arrangements; and, d. Profit margins and mark ups, provided this limitation shall not extend to discussions of methods of operation, maintenance, and similar matters in which cost or efficiency is merely incidental.
- III. It is a violation of Antitrust laws to agree not to compete, therefore, discussions of division of territories or customers or limitations on the nature of business carried on or products sold are not permitted.
- IV. Boycotts in any form are unlawful. Discussion relating to boycotts is prohibited, including discussions about blacklisting or unfavorable reports about particular companies including their financial situation.
- V. It is SITE’s policy that all meetings attended by representatives of the organization where discussion can border on an area of antitrust sensitivity, the Society’s representative requests that the discussion be stopped and asks that the request be made a part of the minutes of the meeting being attended. If others continue such discussion, the Society’s representative should excuse himself from the meeting and request that the minutes show that he left the meeting at that point and why he left. Any such instances should be reported immediately to the President and staff of the Society.
- VI. It is SITE's policy that a copy of these Antitrust Compliance Policies and Procedures be given to each officer, director, committee member, and official representative of member companies annually and that the same be read or described at all official meetings of the membership of the Society.