



THE CALIFORNIA DEPARTMENT OF TAX AND FEE ADMINISTRATION

# MENTORING PROGRAM HANDBOOK

*Planting Seeds for Success*



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## A Message from the Director Nick Maduros

*Mentoring has made a big difference in my life. At critical moments, I've been lucky enough to have people willing to share their experience and provide guidance, helping me navigate my career. Each of us can benefit from some wise counsel on how to expand our experience, increase our knowledge and develop as leaders.*

*As the Director of the California Department of Tax and Fee Administration (CDTFA), I am committed to making sure that our team members have opportunities to mentor and to be mentored. Nothing is more important than giving one another the support necessary to grow and learn in our professional environment. This learning partnership both enhances skills and assists with professional growth, but it also results in terrific friendships.*

*The CDTFA is committed to our core values focusing on smart solutions, being service-oriented and supporting our amazing team. It is my honor and privilege to work alongside you to translate those values into action on behalf of all Californians. To continue to improve our service, we need to unleash the potential of all of our team members, and mentoring is essential to reaching that goal.*

*Thank you to all of our mentors, mentees, supporters, retirees and CDTFA team members. We could not provide the level of service to the people of California without the great work you deliver every day.*

Warmest Regards,

A handwritten signature in black ink that reads "Nick Maduros". The signature is stylized and cursive.

Nick Maduros



# Introduction

## Defining the CDTFA Mentoring Program

Mentoring is a professional relationship in which an experienced person (the mentor) assists another person (the mentee) in developing specific skills and knowledge that will enhance the participants' professional growth.

The CDTFA recognizes that a key component to career development is the transfer of knowledge and experience between employees. The mentoring program will provide a systematic approach for employees to enhance the development of leadership and professional skills while pursuing their career paths.

The CDTFA Mentoring Program will provide guidance and specific objectives to ensure that critical components of the mentoring process are met for participants. This program is designed to assist in career and skill development by transfer of knowledge and experience as well as activities to further enhance competency development.

The CDTFA Mentoring Program will allow mentees to gain knowledge resulting from one-on-one relationships with mentors. In this capacity, the mentor may give the mentee assignments to further build the mentee's skill set.



WE MAKE A LIVING BY WHAT WE GET;  
WE MAKE A LIFE BY WHAT WE GIVE."

-WINSTON CHURCHILL

## How the Program Works

The mentoring partnership will take place over the course of twelve months. Interested employees must complete a mentoring program application ([CDTFA-310](#) for the mentor or [CDTFA-311](#) for the mentee). The Mentoring Program Coordinator will assess the applications and match mentees who meet program requirements with a mentor based on their desired areas of growth. Participants will be notified via email of their partnerships and will meet for the first time at the Kick-Off Celebration hosted by the Workforce Planning Section. In addition, at the conclusion of the program, a Graduation Ceremony will be held for participants who have completed the requirements of the program.

## Goals

### The goals of the program are to:

- Provide a program employees will find useful to connect the importance of institutional knowledge and experience with professional development.
- Retain highly qualified and experienced employees.
- Motivate employees to pursue avenues for promotion and inform employees about the department's organizational structure.
- Create a culture of learning, sharing, and networking within the CDTFA and state government.
- Guide CDTFA employees in achieving their career goals.
- Develop mentees into future mentors.



# Benefits of Mentoring

**Benefits to Mentees:** Increased self-esteem and confidence  
Professional maturity  
Career development  
Learned leadership/Managerial skills

**Benefits to Mentors:** Professional accomplishment  
Satisfaction of helping someone else  
Refined leadership and managerial skills  
Recognition for participation in a job-related volunteer activity

**Benefits to CDTFA:** Recruitment and Retention  
Knowledge transfer  
Workforce development  
Motivated employees  
Cost effectiveness  
Workforce succession planning  
Strategic planning



“IT’S NOT HARD TO  
MAKE DECISIONS WHEN  
YOU KNOW WHAT YOUR  
VALUES ARE.”

—ROY DISNEY

## Characteristics of Successful Mentoring Relationships

The key characteristic of a successful mentoring relationship includes a mentor and mentee that are both open and willing to accept change. Mentoring is a two-way relationship; both mentors and mentees should experience benefits. Often the role of mentor and mentee will change as the relationship develops. Mentors should view a mentoring relationship as an opportunity to teach mentees and to learn from them. This relationship is built on trust, open communication, and respect.

A successful mentoring relationship allows individuals the ability to gain personal and professional growth. It is important for all participating individuals to be committed to the relationship and professional development of the mentee.

A successful mentoring relationship requires honest feedback, clear communication of goals and expectations, and mutual respect between the mentor and mentee. Mentoring is a two-way relationship, which can only produce optimal benefits, if there is active participation on both parts. Mentors can provide guidance to their mentee by providing feedback and addressing critical questions and concerns. The mentor can convey the organization’s culture and best-practices to the mentee, through their daily work routine, level of professionalism, and attitude towards their job. The most effective mentors are willing to assist their mentee by initiating ideas and cultivating a learning environment that facilitates the development of the mentee’s core competencies and professional skill sets. Mentees, who are open to learning and accepting feedback, will benefit the most from participating in the program.

All mentoring relationships evolve and change with time. As time passes, the needs and goals of the mentee may change. As the mentee grows and completes set goals, the mentor may identify new challenges for the mentee that further enhance the mentee’s development and professional growth.

## Requirements for Participation

### Mentor Requirements

- One year program commitment.
- One year as a CDTFA employee.
- No current performance issues.
- Willingness to provide feedback during and at the conclusion of the program.
- Meet a minimum of 12 times during the one-year partnership.
- Sign the CDTFA Mentoring Program Graduation Verification certifying the mentee has met the expectation of the program before the mentee is eligible to participate in the graduation ceremony.
- Supervisor's approval to participate in the program.

### Mentee Requirements

- One year program commitment.
- One year as a CDTFA employee.
- No current performance issues.
- Willingness to provide feedback during and at the conclusion of the program.
- Must obtain signature of the mentor on the CDTFA Mentoring Program Graduation Verification certifying the mentee has met the expectation of the program before mentee is eligible to participate in the graduation ceremony.
- Supervisor's approval to participate in the program.

THE ULTIMATE LEADER IS NOT AFRAID  
TO DEVELOP PEOPLE TO THE POINT  
THEY SURPASS HIM OR HER IN  
KNOWLEDGE AND ABILITY."

—FRED A. MANSKE, JR.



# Roles and Responsibilities

## Mentor

The mentor is a knowledgeable and trusted leader who will assist the mentee by sharing knowledge, experiences, and resources. Mentors may perform many different roles. However, their main role is to listen, support, and guide the mentee's professional development.

### **The mentor is responsible for driving the mentoring relationship, which entails:**

- Providing opportunities for mentee to learn new skills,
- Tracking meetings on the CDTFA Mentoring Program Meeting Log Worksheet,
- Actively listening and encouraging mentee,
- Assisting mentee with developing alternatives to work out a problem or situation,
- Maintaining confidentiality,
- Sharing professional lessons learned,
- Following the ground rules,
- Providing feedback to mentee, and
- Completing evaluations.

## Mentee

The mentee is responsible for being proactive in their professional growth and development. The mentee is responsible for attending meetings and completing assignments. The mentee needs to be willing to learn through constructive feedback and accept guidance from the mentor.

### **The mentee is responsible for actively participating in his/her own professional growth, which entails:**

- Identifying the specific skills and knowledge to be obtained,
- Candidly discussing issues and considering advice,
- Maintaining confidentiality,
- Attending required meetings with mentor,
- Following handbook ground rules,
- Completing evaluations, and
- Completing development assignments agreed upon with the mentor.

## Supervisor

The supervisor's role is to support and consent to participation in the program. The supervisor encourages the mentee or mentor to participate. The supervisor also allows time for mentee meetings, including 3-4 hours monthly for related assignments.



**The supervisor's role entails:**

- Being supportive of the CDTFA Mentoring Program.
- Encouraging participation.
- Acknowledging employee's participation by signing the Mentor/Mentee Application.
- Allowing reasonable time to participate.
- Respecting the confidentiality of the mentoring relationship.

**Workforce Planning**

Workforce Planning (WFP) provides oversight and administration of the CDTFA Mentoring Program. WFP works to continually improve the mentoring program to ensure that it will be a success for all participating employees. The section will act as the program's coordinator and provide mentoring resources.

**In addition, WFP will also:**

- Track and maintain mentoring program files.
- Review mentor and mentee applications.
- Maintain confidentiality.
- Match mentor and mentee with consideration for geographic location.
- Provide Kick-Off Orientation for mentee and mentor.
- Organize Graduation Ceremony.
- Survey participants for data.
- Maintain handbook, forms, and webpage.



“TELL ME AND I FORGET,  
TEACH ME AND I MAY  
REMEMBER, INVOLVE ME  
AND I LEARN.”

–BENJAMIN FRANKLIN



# Mentor

## What is a Mentor?

The CDTFA defines a mentor as someone who imparts wisdom to and shares knowledge with a less-experienced colleague. The mentor's knowledge, experience, and skills based on their personal life experiences may provide the mentee guidance, advice, and hands-on training to build the required competencies for professional growth and development. The mentor may share information about his or her own career path, and provide guidance, motivation, and role modeling. A mentor will assist the mentee with setting and achieving goals, networking, and identifying the resources necessary to move forward in their career path.

## Six roles of a mentor:

**Guide:** The mentor guides the mentee by providing specialized knowledge and possession of specific competencies that leads the mentee through skill enhancement and development. The mentor listens actively to the mentee to demonstrate respect and encourages the mentee to develop problem-solving skills by having the mentee demonstrate how she or he would attempt to solve the problem. The mentor offers guidance by demonstrating or sharing an approach to solve the problem.

**Motivator:** The mentor will motivate the mentee through encouragement and support. The mentor can also motivate the mentee by utilizing assignments. The assignments can be those described in brochures and handouts provided by Workforce Planning (WFP). The material and/or mentoring ideas given by WFP is not required, rather informational and suggested only. The mentor and mentee can also identify specific competencies they wish to improve upon and help them put a plan together on how to develop those competencies.

**Sponsor:** As a sponsor, the mentor may present and create opportunities to assist the mentee with developing networks and establishing resources. This can be done by making recommendations of relevant resources and introducing the mentee to the knowledge required within their division as well as introducing the mentee to other CDTFA employees, as appropriate.

**Coach:** The mentor provides positive and constructive feedback. Positive feedback increases self-esteem and provides a sense of accomplishment. It is important that feedback be frequent and directly linked to an observation made by the mentor.

**Advisor:** The mentor advises and assists with setting realistic career goals that have a reasonable time frame and relevant outcome based on the mentee's promotional pattern interest.

**Role Model:** The mentor acts as a role model for the mentee by demonstrating behaviors that can be emulated by the mentee. The mentee's sessions should be kept confidential, to ensure trust and communication. The mentor displays interactions with others, advises how to handle certain situations, and provides an example of values, ethics, and professional practices considered important for self-development.

## Getting Started as a Mentor

At the beginning of the mentoring relationship, the focus is on getting to know each other. The introductory period is important for building trust in the relationship and developing an understanding of one another.

The introductory phase will start at the kick-off meeting where you will meet for the first time—a good time to spend a few minutes getting to know one another, and scheduling your first mentoring meeting.

### First meeting steps:

- Complete the CDTFA Mentoring Program Agreement.
- Identify your individual expectations for participating in the program.
- Obtain information on the mentee's job experience, and share your career history.
- Identify the mentee's short and long term goals.
- Set the ground rules for the mentoring relationship; for example:
  - Tentative re-occurring meeting schedule and location.
  - Best ways to communicate between meetings.
  - Protocol for canceling a scheduled meeting.
  - Being timely and prepared for the meetings.

### Get to know one another and keep it fun!

- Enthusiasm
- Positive Attitude
- Sincerity



“MENTORING IS A BRAIN TO PICK, AN EAR TO LISTEN, AND A PUSH IN THE RIGHT DIRECTION.”

—JOHN CROSBY



# Mentor (continued)



## How to be a Good Mentor

There is not a specific “correct” way to be a good mentor. Every mentoring relationship is different, and the goals and expectations will vary depending on the individuals. Here are tips to help guide you:

- Be yourself.
- Listen to your mentee and then share your knowledge that relates to their wants and needs.
- Learn what is important to your mentee by asking questions.
- Understand their expectations.
- Focus your mentoring approach to meet the needs of your mentee. If your mentee is not clear on their career goals, assist in exploring options and developing a career path. Encourage them to make a plan, put it into action, and follow through.
- If your mentee needs help with self-confidence, then that could be an area that you assist in developing.
- Reflect on your experiences. Were there mentors that helped develop your career? If so, what methods did they use, and were they successful?
- Understand that good relationships take time to develop.
- Ask powerful questions and provide insight, if needed.
- Be empathetic to any issues that your mentee may be addressing, but stay neutral and do not get caught up in the issues.
- Understand your own personal vision and goals.
- Maintain and respect privacy, honesty, and integrity.
- Ask the mentee to express thoughts, ideas, and concerns.
- Remember to be positive.





## Discussions and Activities

The mentoring relationship will be based on your own personal style and personal expectations. Below are ideas on topics to discuss and activities in which to engage with your mentee.

### Questions to ask:

- Why did you decide to participate in the CDTFA Mentoring Program?
- What do you hope to get out of participating in the program?
- What are your worries, frustrations, or concerns at work?
- What career options do you wish to pursue?
- What excites you about your job?
- What does success look like for you?
- What are your goals for your current position?
- Is there a problem you would like to work on?
  - Why is it a problem?
  - What are some possible ways to resolve the problem?

### Activities to engage in:

- Share your own experiences, successes, failures, and observations.
- Introduce your mentee to other managers to help them network.
- Bring the mentee to appropriate meetings with you, demonstrate how you conduct meetings.
- Work with your mentee to identify his or her strengths and weaknesses, then identify a plan of action to address those weaknesses.
- Share books or articles relating to the mentee's development.
- Help mentee identify professional development opportunities.
- Work on brainstorming solutions for current challenges the mentee is facing.
- Role play to resolve a difficult situation.
- Ask your mentee to teach you something.
- Check in on your mentee and see how they are doing.
- Discuss work and personal life balance.
- Make the meeting fun; enjoy your time together.
- Discuss "assignments" that can build your mentee's skills.
- Refer to additional resources, such as looking for ideas together in the "75 Things to Do with Your Mentee" booklet.



# Mentee



“WE MUST OPEN THE DOORS OF OPPORTUNITY. BUT WE MUST ALSO EQUIP OUR PEOPLE TO WALK THROUGH THOSE DOORS.”

—LYNDON B. JOHNSON

## Mentee Best Practices

It is a common misconception that the mentor provides advice and tells the mentee what to do. Actually, the mentee is an active participant, and defines the needed knowledge, skills, and abilities. It is essential that the mentee has a clear understanding of the goals and expectations so the mentor can assist the mentee with meeting them. In setting and defining these goals, it will help the mentoring relationship to stay on course.

### To ensure success, the mentee must:

- Set out to achieve new skills and knowledge,
- Seek guidance and advice for professional development,
- Accept responsibility for decisions and actions,
- Maintain confidentiality,
- Carry out tasks and projects by agreed times,
- Maintain trust and respect,
- Attend all scheduled meetings,
- Establish goals, objectives, and milestones required to achieve them, and
- Identify training to help meet goals.





## Mentee Best Practices

- Attend appointments with your mentor.
- Complete the CDTFA Mentoring Program Agreement.
- Discuss your individual expectations for participating in the program.
- Agree upon ground rules for your mentoring relationship:
  - How often will you meet, and for how long?
  - Are calls or emails between meetings acceptable?
  - What is the protocol for canceling a scheduled meeting?
  - Where are your meeting places?
- Prepare an agenda for your meetings.
- Discuss possible activities the mentor may provide you with to develop certain skills. If you accept an assignment, then complete it within the time frame determined by you and your mentor.
- Provide feedback to the mentor. This will assist your mentor in helping you.
- Listen to the information and guidance provided by your mentor. Don't focus on the reasons you can't, look for how you can.
- Conduct a self-analysis of your skill sets. Look at your last project and the areas that you experienced difficulty.
- Expect support from your mentor, not miracles. The mentor is there to provide guidance, act as a sounding board to help you determine how to handle situations, and put things in perspective. The mentor is not there to solve your problems.
- Communicate clearly. It is important to effectively communicate your needs to your mentor.
- Be teachable. In order to be an effective mentee, you must be willing to learn new things, obtain new perspectives, and be responsive to constructive criticism.
- Show appreciation and share credit for accomplishments with your mentor.
- Remember, this is your professional development. Be proactive and take initiative. Take responsibility for its progress and the outcomes.
- Be sure to complete required criteria for graduation from the program.



“CONTROL YOUR OWN  
DESTINY OR SOMEONE  
ELSE WILL.”

–JACK WELCH

# Appendixes





NAME		DATE
CLASSIFICATION	DIVISION	BUREAU
EMAIL		TELEPHONE NUMBER
SUPERVISOR'S NAME		TELEPHONE NUMBER

In order to be eligible to participate in the California Department of Tax and Fee Administration (CDTFA) Mentoring Program, applicants must be appointed to a permanent, full-time position and must have been employed by CDTFA for a minimum of one year. *Due to the unknown number of applicants, it is possible that those who wish to participate in the program may not be selected.* All information gathered in this application is for the purpose of matching participants with the most appropriate mentee. The supervisor signs this form as verification that there are no current performance issues and acknowledges the time commitment involved to participate, as listed in the Roles and Responsibilities section of the CDTFA Mentoring Program Handbook.

**Application Questions** *(Please answer all of the following questions as completely as possible.)*

1. Why are you interested in becoming a mentor?

2. Are you able to commit to the CDTFA Mentoring Program for 12 months?

Yes    No

3. Are you willing to participate in mentoring events and activities?

Yes    No

4. Have you received mentoring training, or have you previously been involved in the CDTFA Mentoring Program?

Yes    No

If yes, please explain:

Which areas can you help others develop through mentoring? *(Check all that apply)*

- |                                                           |                                                   |                                                                |
|-----------------------------------------------------------|---------------------------------------------------|----------------------------------------------------------------|
| <input type="checkbox"/> Analytical Thinking              | <input type="checkbox"/> Forward Thinking         | <input type="checkbox"/> Professional Confidence               |
| <input type="checkbox"/> Applies Technology to Tasks      | <input type="checkbox"/> Fostering Diversity      | <input type="checkbox"/> Professional and Personal Development |
| <input type="checkbox"/> Business Acumen                  | <input type="checkbox"/> Global Perspective       | <input type="checkbox"/> Presentation Skills                   |
| <input type="checkbox"/> Career Development               | <input type="checkbox"/> Influencing Others       | <input type="checkbox"/> Relationship Building                 |
| <input type="checkbox"/> Change Leadership                | <input type="checkbox"/> Initiative               | <input type="checkbox"/> Resource Management                   |
| <input type="checkbox"/> Communication (Verbal/Written)   | <input type="checkbox"/> Interpersonal Skills     | <input type="checkbox"/> Results Orientation                   |
| <input type="checkbox"/> Conflict Management              | <input type="checkbox"/> Learning                 | <input type="checkbox"/> Risk Management                       |
| <input type="checkbox"/> Creative Thinking                | <input type="checkbox"/> Managerial Skills        | <input type="checkbox"/> Stress Management                     |
| <input type="checkbox"/> Customer Focus                   | <input type="checkbox"/> Mentoring                | <input type="checkbox"/> Teamwork                              |
| <input type="checkbox"/> Decision Making                  | <input type="checkbox"/> Motivation               | <input type="checkbox"/> Team Leadership                       |
| <input type="checkbox"/> Developing Others                | <input type="checkbox"/> Negotiation              | <input type="checkbox"/> Thoroughness                          |
| <input type="checkbox"/> Diagnostic Information Gathering | <input type="checkbox"/> Networking               | <input type="checkbox"/> Vision and Strategic Thinking         |
| <input type="checkbox"/> Empowering Others                | <input type="checkbox"/> Organizational Awareness | <input type="checkbox"/> Workforce Management                  |
| <input type="checkbox"/> Ethics and Integrity             | <input type="checkbox"/> Personal Credibility     | <input type="checkbox"/> Other: _____                          |
| <input type="checkbox"/> Flexibility                      | <input type="checkbox"/> Planning and Organizing  | <input type="checkbox"/> Other: _____                          |

**CERTIFICATION**

**Please read the following carefully prior to signing:**

*The California Department of Tax and Fee Administration Mentoring Program appreciates your interest in participating. We will review the completed application and send you a memorandum informing you of the outcome of your application.*

Please initial each of the following and sign below:

\_\_\_\_\_ I agree to follow the CDTFA Mentoring Program Handbook.

\_\_\_\_\_ I agree to complete all evaluations for the duration of the program.

By signing below, I agree to all of the above terms and conditions.

**SIGNATURES**

*We have read and understand the guidelines for mentoring relationships.*

MENTOR'S NAME <i>(please print)</i>	MENTOR'S SIGNATURE	DATE
SUPERVISOR'S NAME <i>(please print)</i>	SUPERVISOR'S SIGNATURE	DATE



NAME		DATE
CLASSIFICATION	DIVISION	BUREAU
EMAIL		TELEPHONE NUMBER
SUPERVISOR'S NAME		TELEPHONE NUMBER

In order to be eligible to participate in the California Department of Tax and Fee Administration (CDTFA) Mentoring Program, applicants must be appointed to a permanent, full-time position and must have been employed by CDTFA for a minimum of one year. *Due to the unknown number of applicants, it is possible that those who wish to participate in the program may not be selected.* All information gathered in this application is for the purpose of matching participants with the most appropriate mentor. The supervisor signs this form as verification that there are no current performance issues and acknowledges the time commitment involved to participate, as listed in the Roles and Responsibilities section of the CDTFA Mentoring Program Handbook.

**Application Questions** *Please answer all of the following questions as completely as possible.*

1. Why are you interested in the CDTFA Mentoring Program?

2. Are you able to commit to the CDTFA Mentoring Program for 12 months?

Yes  No

3. Are you willing to participate in mentoring events and activities?

Yes  No

4. Please state any relevant information regarding your preferred mentor selections as identified below.

Please list 5 preferred mentors that you would like to be mentored by (cannot be in your chain of command and must be at least two classifications above your current classification):

NAME	TELEPHONE NUMBER
NAME	TELEPHONE NUMBER
NAME	TELEPHONE NUMBER
NAME	TELEPHONE NUMBER
NAME	TELEPHONE NUMBER

Which areas would you like to develop through mentoring? *(Check all that apply)*

- |                                                           |                                                   |                                                                |
|-----------------------------------------------------------|---------------------------------------------------|----------------------------------------------------------------|
| <input type="checkbox"/> Analytical Thinking              | <input type="checkbox"/> Forward Thinking         | <input type="checkbox"/> Professional Confidence               |
| <input type="checkbox"/> Applies Technology to Tasks      | <input type="checkbox"/> Fostering Diversity      | <input type="checkbox"/> Professional and Personal Development |
| <input type="checkbox"/> Business Acumen                  | <input type="checkbox"/> Global Perspective       | <input type="checkbox"/> Presentation Skills                   |
| <input type="checkbox"/> Career Development               | <input type="checkbox"/> Influencing Others       | <input type="checkbox"/> Relationship Building                 |
| <input type="checkbox"/> Change Leadership                | <input type="checkbox"/> Initiative               | <input type="checkbox"/> Resource Management                   |
| <input type="checkbox"/> Communication (Verbal/Written)   | <input type="checkbox"/> Interpersonal Skills     | <input type="checkbox"/> Results Orientation                   |
| <input type="checkbox"/> Conflict Management              | <input type="checkbox"/> Learning                 | <input type="checkbox"/> Risk Management                       |
| <input type="checkbox"/> Creative Thinking                | <input type="checkbox"/> Managerial Skills        | <input type="checkbox"/> Stress Management                     |
| <input type="checkbox"/> Customer Focus                   | <input type="checkbox"/> Mentoring                | <input type="checkbox"/> Teamwork                              |
| <input type="checkbox"/> Decision Making                  | <input type="checkbox"/> Motivation               | <input type="checkbox"/> Team Leadership                       |
| <input type="checkbox"/> Developing Others                | <input type="checkbox"/> Negotiation              | <input type="checkbox"/> Thoroughness                          |
| <input type="checkbox"/> Diagnostic Information Gathering | <input type="checkbox"/> Networking               | <input type="checkbox"/> Vision and Strategic Thinking         |
| <input type="checkbox"/> Empowering Others                | <input type="checkbox"/> Organizational Awareness | <input type="checkbox"/> Workforce Management                  |
| <input type="checkbox"/> Ethics and Integrity             | <input type="checkbox"/> Personal Credibility     | <input type="checkbox"/> Other: _____                          |
| <input type="checkbox"/> Flexibility                      | <input type="checkbox"/> Planning and Organizing  | <input type="checkbox"/> Other: _____                          |

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**Please read the following carefully prior to signing:**

*The California Department of Tax and Fee Administration Mentoring Program appreciates your interest in participating. We will review the completed application and send you a memorandum informing you of the outcome of your application.*

Please initial each of the following and sign below:

\_\_\_\_\_ I agree to follow the CDTFA Mentoring Program Handbook.

\_\_\_\_\_ I agree to complete all evaluations for the duration of the program.

By signing below, I agree to all of the above terms and conditions.

**SIGNATURES**

MENTEE'S NAME <i>(please print)</i>	MENTEE'S SIGNATURE	DATE
SUPERVISOR'S NAME <i>(please print)</i>	SUPERVISOR'S SIGNATURE	DATE





MENTOR'S NAME

MENTEE'S NAME

**MENTOR'S RESPONSIBILITIES**

- Provide opportunities for mentee to learn new skills
- Attend at least 12 monthly meetings with mentee and track on CDTFA Mentoring Program Meeting Log Worksheet
- Actively listen and encourage mentee
- Maintain confidentiality
- Share professional lessons learned
- Follow handbook ground rules
- Provide feedback to mentee
- Complete evaluations

**MENTEE'S RESPONSIBILITIES**

- Identify the specific skills and knowledge to be obtained
- Candidly discuss issues and consider advice
- Maintain confidentiality
- Attend at least 12 monthly meetings with mentor
- Follow handbook ground rules
- Complete evaluations
- Complete development assignments agreed upon with the mentor

Areas of development mentee would like to model and practice:

Elements of the mentee's development plan to be worked on:

**SIGNATURES**

*We have read and understand the guidelines for mentoring relationships.*

MENTOR'S NAME <i>(please print)</i>	MENTOR'S SIGNATURE	DATE
MENTEE'S NAME <i>(please print)</i>	MENTEE'S SIGNATURE	DATE

**CDTFA MENTORING PROGRAM  
PROFESSIONAL DEVELOPMENT MENTEE  
SELF-ASSESSMENT WORKSHEET**



Write your goals, objectives, and developmental needs. Examining these areas will be the foundation for your professional development.  
**Please complete and give to your mentor.**

<p><b>Goals</b> Define what you would like your professional life to be like over the next 5–10 years.</p>	<p><b>Objectives</b> For each goal, identify how you will accomplish it and what specific steps you will take.</p>	<p><b>Developmental Needs</b> For each objective, list the skills or competencies you will need.</p>
<p>1.</p>	<p>a.</p> <p>b.</p> <p>c.</p>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<p>2.</p>	<p>a.</p> <p>b.</p> <p>c.</p>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<p>3.</p>	<p>a.</p> <p>b.</p> <p>c.</p>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>

MENTEE SIGNATURE

DATE

**CDTFA MENTORING PROGRAM  
MEETING LOG WORKSHEET**



MENTOR'S NAME	MENTEE'S NAME	DATE	NUMBER OF HOURS MET
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GOAL/TOPIC(S) DISCUSSED:

GOAL THAT DISCUSSION/ACTIVITY RELATED TO:

COMPETENCY WORKED ON:

OBSERVATIONS/COMMENTS:

AGREED UPON FOLLOW-UP ITEMS AND OR ASSIGNMENTS:



MENTOR'S NAME	MENTEE'S NAME
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All mentees must submit this form in order to graduate and/or attend the California Department of Tax and Fee Administration (CDTFA) Mentoring Program Graduation Ceremony. Mentors will need to sign as verification that the mentee has met the requirements for graduation.

**GRADUATION CHECKLIST**

I certify that the mentee completed the following requirements:

- The mentee met with me 12 times during the full 12-month period.
- The mentee completed the development activities and/or assignments given.
- The mentee took initiative and was proactive in his/her professional growth.
- The mentee was willing to learn through constructive feedback and was open to discuss issues and consider advice.
- I certify, to the best of my knowledge, that the mentee completed the program requirements and should be eligible for graduation.

**SIGNATURES**

MENTOR'S NAME <i>(please print)</i>	MENTOR'S SIGNATURE	DATE
MENTEE'S NAME <i>(please print)</i>	MENTEE'S SIGNATURE	DATE

**Upon completion of the program, please submit this form to [mentoring@cdtfa.ca.gov](mailto:mentoring@cdtfa.ca.gov) to meet eligibility for graduation.**

