

CUSTOMIZING MENTORSHIP PROGRAMS

*for Any Procurement
Organization*



Department: Research and Innovation

Email: research@naspo.org

Primary Author: Jack Heffernan, Research Coordinator

NASPO
National Association of
State Procurement Officials

INDEX

INTRODUCTION	<u>1</u>
STEP 1: Determining the Purpose	<u>2-5</u>
STEP 2: Planning and Structure	<u>5-7</u>
STEP 3: Evaluating the Mentorship Program	<u>8</u>
CASE STUDIES	<u>8</u>
CONCLUSION	<u>9</u>
ADDITIONAL RESOURCES	<u>9</u>
NORTH CAROLINA: Mentoring Interns for Present and Future Value	<u>10-13</u>
MICHIGAN: On-Demand Mentorship for New Hires	<u>14-16</u>
PENNSYLVANIA: Planning for Mass Retirements Through Mentorship	<u>17-19</u>

INTRODUCTION

Anyone who hears the phrase “mentorship” likely pictures a program structured in one specific form. But such programs have evolved in recent decades to address a variety of needs for different kinds of organizations and professionals. This evolution comes as interest and research about how to start mentorship programs has increased.¹ Membership programs often seek to promote career advancement, build relationships, and improve leadership skills.

How do mentorship programs provide value specifically to state procurement offices?

This toolkit provides a range of options for state procurement offices designing mentorship programs that fit their specific needs. It covers:

- Determining goals and experience levels to select a specific type of program
- Creating a program that fits organizational cultures
- Roles of participants
- Potential challenges
- Evaluation

Included are checklists, usable templates, lists of questions to consider, and additional resources. Three case studies highlight successful programs with different purposes. The toolkit is a starting point for anyone considering starting a mentorship program in their organization.



¹ Treasure, Anne M, et al., “Ten simple rules for establishing a mentorship programme,” U.S. National Institutes of Health, May 22, 2022, <https://pmc.ncbi.nlm.nih.gov/articles/PMC9098017/>.



STEP 1: DETERMINING THE PURPOSE

A typical first step when launching mentorship programs is to form a committee or working group tasked with establishing goals. In subsequent meetings, this committee oversees other high-level elements of the program, such as determining the type of program, the structure, roles within the program, and how the program is to be evaluated.²

To create a program that best aligns with office operations and culture, the committee would include a range of perspectives, backgrounds, professional experiences, and seniority levels.³ If planned effectively, this first step can provide guidance and consistency throughout the program formation.

Developing goals that align with the organization's mission statement is a best practice.

Typically, goals are most effective when they are measurable and achievable within a specific time window. Worth keeping in mind are the target audience for the program and areas of focus.⁴ Based on the developed goals and experience levels of mentors and mentees, program designers can select from an array of options.

Programs can be tailored to suit all types of experience levels within procurement offices. These include:

- Interns
- New hires
- Mid-career professionals
- Prospective organization leaders
- Organization leaders

² "Procurement U: Talent Management Strategies," National Association of State Procurement Officials, accessed June 4, 2025, <https://www.naspo.org/procurement-u/course-catalog/212-talent-management-strategies-for-the-procurement-office/>.

³ "6 Tips for Establishing a Supply Chain Mentorship Program," SCM Talent Group, August 22, 2022, <https://scmtalent.com/supply-chain-mentorship-program/>.

⁴ Treasure, Anne M, et al., "Ten simple rules for establishing a mentorship programme," U.S. National Institutes of Health, May 22, 2022, <https://pmc.ncbi.nlm.nih.gov/articles/PMC9098017/>.

Program Types

With office goals and experience levels in mind, program designers can then decide how to structure the program. Formal programs feature structured timelines, meeting schedules, and objectives. Informal programs rely more on ad hoc guidance and organic relationships. One-on-one mentoring allows programs to be exhaustive, while group mentoring sessions allow for quick, targeted approaches.

For more formal programs, a typical recommendation is that program cycles last six to 12 months. Some programs can be conducted with mentors and mentees located far apart—using video calls or email—while others are in person.⁵ Mentorship programs are attainable for any organization, regardless of the amount of available resources or geographic constraints. The key question is which style of program fits best and which elements are necessary.

This toolkit primarily focuses on one-on-one, formal programs that offer career mentorship. But here are some other types of mentorship programs:

Peer Mentoring Groups

Colleagues at similar experience levels offer support, advice, and discussion

Reverse

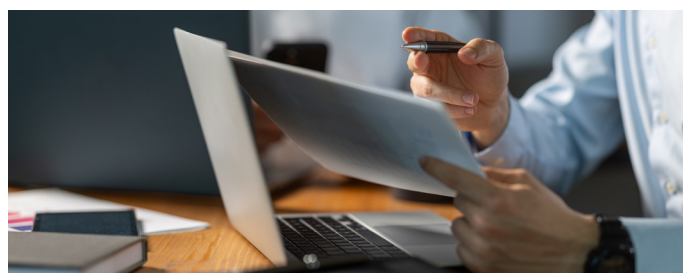
Junior staff members mentor more senior staff on emerging skills such as social media usage

Topical/Situational

Focus on specific subjects or skills, purposes, or career goals

Flash

Brief, one-time sessions for quick professional development or advice⁶



Questions to Consider at the Beginning of Program Design

- Who might be good candidates for the initial working group?
- What would an effective evaluation process look like in the office?
- How will the enrollment process be structured?
- How might participants be incentivized and rewarded?



Potential Challenges

- Encouraging time-strapped professionals to be available for mentees
- Maintaining the relationship over time to avoid drop-off
- Ensuring that the program is recognized as indispensable within the organization
- Tailoring the program to meet the specific needs of mentors, mentees, and the organization

⁵ "AFP/Blackbaud Merging Leader Mentor Program," Association of Fundraising Professionals," accessed June 2, 2025, <https://afpidea.org/emergingleaders/support>.

⁶ Childress, Rasheeda, "The Magic of Mentoring," American Society of Association Executives," July 2019, https://www.asaecenter.org/resources/articles/an_magazine/2019/july-august/the-magic-of-mentoring.

Program Objectives Worksheet

This worksheet can help sift through the initial questions of starting a mentorship program. Prompts are in red, and example responses are italicized.

1. Determine the target audience and areas of focus, based on the experience levels of the program participants.

Example: Our program aims to prepare future organizational leaders by pairing them with mentors who will soon retire.

2. List program objectives, such as cross-training institutional knowledge, onboarding, succession planning, retention, and recruitment.

Example: The goal of our mentorship program is to share institutional knowledge while concurrently providing the foundation of succession planning in our agency.

3. Application Process: Participants are paired with mentors who have similar communication styles and experience in the mentees' targeted area for growth, using one of several pairing options.

Example: Mentee A prefers a "hands-off" approach and due to their schedule, does not wish to meet more than once a month. Mentee A will be paired with Mentor C who also prefers a "hands-off" approach and cannot meet more than once a month due to time constraints.

4. Cycle Duration of Mentor/Mentee Relationship: Cycle lengths may vary on the intended goals of each pairing. As a matter of policy, the proposed cycle duration is _____.

Example: Best practice suggests that most programs last roughly 6-12 months.

5. Reward: Allows participants to feel appreciated and encourages participation of others in future program cycles. Our program will reward participants by _____.

Example: Hosting monthly lunches with executive staff and program participants, as well as a celebration ceremony at the end of each cycle.

First Working Group Meeting Agenda Template

**This template offers examples of agenda items for the first working group or committee meeting. Users are encouraged to tailor the agenda for their organizations' needs.*

1. Background and scope discussion

- ☐ Background for mentorship rollout and how it aligns with the organization's mission statement
- ☐ Present shared vision for the proposed initiative and expected benefits
- ☐ Discuss "the why"

2. Define objectives and responsibilities

- ☐ Agree upon specific, measurable goals
- ☐ Determine target audience and areas of focus
- ☐ Determine roles and responsibilities
- ☐ Select program type

3. Timeline and next steps

- ☐ Discuss next steps toward implementation
- ☐ Create timeline for implementation

STEP 2: PLANNING AND STRUCTURE

Staff Buy-In (From Top-Down to Bottom-Up)

To ensure that programs are designed optimally for specific offices, program designers should thoroughly evaluate office culture. These determinations buffer learning and relationship building efforts.⁷ Program participants may be more inclined to join with formal incentives, such as pairing the program with credits toward continuing education requirements.⁸ Formal recognition of participation or achievements can also be effective incentives.⁹ The following questions can help program designers begin to build programs that fit with the office culture:

⁷ "Procurement U: Talent Management Strategies," National Association of State Procurement Officials, accessed June 4, 2025, <https://www.naspo.org/procurement-u/course-catalog/211-building-a-sustainable-purchasing-program/>.

⁸ "AFP/Blackbaud Merging Leader Mentor Program," Association of Fundraising Professionals, accessed June 2, 2025, <https://afpidea.org/emergingleaders/support>.

⁹ "Procurement U: Talent Management Strategies," National Association of State Procurement Officials, accessed June 4, 2025, <https://www.naspo.org/procurement-u/course-catalog/211-building-a-sustainable-purchasing-program/>.

What does the overall structure of the program look like, and why is that the best structure for the organization?

Is there an official, or even unofficial, philosophy in the organization? How does this affect daily processes?

What assumptions can be made about how employees will respond to a mentorship program?

What about the workplace culture would foster a successful program? What could pose challenges?

Mentor-Mentee Pairing

The start of a mentorship program cycle often involves a formal mentee-mentor enrollment process.¹⁰ **Clear and fully developed guidelines at the outset ensure full understanding of crucial factors like time commitment, confidentiality, program duration, and role specifics.**¹¹ A statement of understanding signed by both mentors and mentees, for example, can adequately define these program elements.¹² Factors that determine effective pairings include shared interest, compatibility, career stage, and geographic proximity. Software tools that optimize mentor-mentee pairings are easily accessible for purchase, or teams may wish to hold discussions about pairings. The pairing process that works best for a specific organization depends on aspects like available resources, office culture, and the specific type of mentorship program.

Roles in mentorship programs:

- Program Directors (Visioning/Administration)
- Program Coordinators (Administration)
- Advisory Board (Visioning)
- Mentors
- Mentees

Checklist of establishing mentor-mentee relationship:

- ☐ Mentor and mentee applications have been collected
- ☐ Mentor/Mentee pairings have been made
- ☐ A list of clear expectations (including meeting frequency) has been prepared
- ☐ Specific success metrics for the mentee and mentor have been developed
- ☐ Specific needs (including for confidentiality) are accounted for

Checklist for launching mentorship programs:

- ☐ Establish a committee and/or working group
- ☐ Define goals and requirements
- ☐ Develop program structure
- ☐ Determine clear expectations for everyone involved in the program
- ☐ Secure support from top management
- ☐ Conduct pre-program, midpoint, and post-program surveys
- ☐ Provide orientation and training for mentors and mentees
- ☐ Hold regular workshops and formal gatherings to maintain engagement

¹⁰ "Procurement U: Talent Management Strategies," National Association of State Procurement Officials, accessed June 4, 2025, <https://www.naspo.org/procurement-u/course-catalog/211-building-a-sustainable-purchasing-program/>.

¹¹ "6 Tips for Establishing a Supply Chain Mentorship Program," SCM Talent Group, August 22, 2022, <https://scmtalent.com/supply-chain-mentorship-program/>.

¹² Treasure, Anne M, et al., "Ten simple rules for establishing a mentorship programme," U.S. National Institutes of Health, May 22, 2022, <https://pmc.ncbi.nlm.nih.gov/articles/PMC9098017/>.

STEP 3: EVALUATING MENTORSHIP PROGRAMS

Organizations with effective mentorship programs ensure continuous improvement by collecting feedback from mentors and mentees at several points in the program cycle.¹³ **Collecting feedback is a best practice at the beginning, midpoint, and end of the program cycle.** This feedback can come from qualitative and quantitative surveys as well as interviews.¹⁴ With data obtained at various points throughout program cycles, program designers can enjoy a wide range of insights before making major decisions.

Before launching a mentorship program, developing key performance indicators (KPIs) can be a vital component of the continuous improvement process. KPIs are evidence-based metrics that measure program performance. They are a combination of measurable data with goals, requirements, and outcomes. KPIs can help mentorship program designers monitor the program for ongoing needs, make long-term decisions about the program, and demonstrate its value.¹⁵ A mentorship program that prioritizes networking for interns, for example, might list as a KPI the number of substantive work-related interactions with more senior members of the organization.



CASE STUDIES

The following case studies are examples of effective mentorship programs in state procurement offices. These programs serve offices who wish to mentor:

- [Mentoring Interns for Present and Future Value \(North Carolina\)](#)
- [On-Demand Mentorship for New Hires \(Michigan\)](#)
- [Planning for Mass Retirements Through Mentorship \(Pennsylvania\)](#)

Included in each case study are summaries of the problem that offices seek to address, the solutions, how those solutions are implemented, and the results of the solutions. Also included is some perspective from program leaders about how other states might implement their own programs. Readers are encouraged to consider these case studies in conjunction with this entire toolkit, examining which elements in these programs could work for their organizations and which might not.

¹³ "Procurement U: Talent Management Strategies," National Association of State Procurement Officials, accessed June 4, 2025, <https://www.naspo.org/procurement-u/course-catalog/211-building-a-sustainable-purchasing-program/>.

¹⁴ Childress, Rasheeda, "The Magic of Mentoring," American Society of Association Executives, July 2019, https://www.asaecenter.org/resources/articles/an_magazine/2019/july-august/the-magic-of-mentoring.

¹⁵ Stephens, Chadwick, "How Do You Do? An Introduction to Key Performance Indicators (KPIs)," National Association of State Procurement Officials, May 2025, <https://cdn.naspo.org/RI/AnIntroductiontoKeyPerformanceIndicators.pdf>.

CONCLUSION

Mentorship programs provide structured space and time for knowledge sharing, personal growth, and leadership development.¹⁶ But they do not need to look the same. They can vary in size, objectives, style, participants, format, and duration, among other factors. The key ingredients:

- Purpose, goals, program type, and roles
- Clear communication of program specifics to all involved
- Secure organizational buy-in
- Mentor-mentee pairing
- Useful evaluation of the program at the beginning, midpoint, and end of each cycle

If successful, program designers can know that they have established a long-standing structure for their organization's current and future professional development.

ADDITIONAL RESOURCES

- [National Institutes of Health - Ten Simple Rules for Establishing a Mentorship Program](#)
- [Procurement U - Networking and Mentorship for Women in Business](#)
- [Procurement U - Talent Management Strategies](#)
- [National Association of State Procurement Officials - How Do You Do? An Introduction to Key Performance Indicators](#)



¹⁶ "Procurement U: Talent Management Strategies," National Association of State Procurement Officials, accessed June 4, 2025, <https://www.naspo.org/procurement-u/course-catalog/212-talent-management-strategies-for-the-procurement-office/>.

NC: MENTORING INTERNS

for Present and Future Value

Many state procurement offices are grappling with how to establish an effective mentorship program. Many offices are also asking how to attract recent college graduates to the profession. What if a state procurement office could do both? The North Carolina Division of Purchase and Contract has done just that.

THE BIG IDEA

The North Carolina procurement office wanted to attract recent college graduates as new hires. But, like other public procurement offices, it needed to overcome a lack of familiarity with the profession among college graduates. While the office hosted a mentorship-internship program on an on-and-off basis before 2020, it was less formal and did not actively encourage interns to remain in the office beyond the end of the program. Office leaders developed an idea: why not mentor college interns before graduation? The goal is to give interns enough connections and experience for an entry-level position, incentivizing them to accept a job offer.

To implement the idea, the program allows interns, who effectively become mentees at the beginning of their internships, to manage often-large projects with relatively minimal supervision. The 11-month program welcomes college students and recent graduates. It begins in the summertime with two months of full-time work, followed by nine months of part-time work during the school year. The yearly number of mentee-interns ranges from three to five. With greater responsibility comes greater incentive to return to the office once the program is finished, either as a mentee again or as a full-time employee after graduation.

Some mentees even become certified as contract managers or purchasers. One recent mentee managed North Carolina's procurement office's statewide furniture contract, which includes 131 suppliers in one of the state's major industries.¹⁷

"The deeper you can get them, the more likely that they'll get embedded, that they'll get that sense of family and partnership," said Jody Clevon, a Deputy State Purchasing Officer and Chief Learning Officer for the procurement office. "And of course, the cost savings of not having to recruit fully, you've got a known commodity ready to return."

The program's key performance indicators included the following, all of which have shown increases:

- Mentee program completion rate
- Number of procurement-related tasks completed by mentees
- Hours of staff time saved
- Mentee career readiness

¹⁷ Heffernan, Jack, "North Carolina Internship Program Offers Workforce Development Model," National League of Cities, September 19, 2024, <https://www.nlc.org/article/2024/09/19/north-carolina-internship-program-offers-workforce-development-model/>.

DESIGNING USEFUL CHECK-INS

Specific elements of the program require buy-in from everyone in the office. Cleven often works under a simple principle: if it has a name, it has a place. Accordingly, she coined an acronym for the kickoff meeting that mentees attend at the start of the program called **EMBARC – Entering, Mind-Blowing, and Really Cool**.

In the meeting, one day after the onboarding day with human resources and with the office's entire leadership team present, mentors and mentees are paired based on experience and interest. With its name entrenched after launching in the program's second year, EMBARC has become a mainstay.

During the meeting, the office leadership team details the five sections of the purchasing division – strategic sourcing, risk and compliance, contract management, operations and system support, and procurement education. Mentees rank preferences, and the leadership team assigns mentors to mentees, considering the preferences and alignment with the mentees' degree focus. For example, mentees focused on pre-law in their undergraduate studies have often been placed in the contract management section. Current workloads in each section can also be a factor, particularly when a mentee does not specify a strong preference.

Another meeting that has become a core tenet is called **MIMIC: Monthly Intern-Mentor Issues Check-in**. Created after EMBARC, the meeting is an opportunity to:

- Raise questions or concerns
- Share status updates
- Engage in shared learning between mentors and mentees

Its usefulness prompted the office to create the MIMIC Minute, a lunch-and-learn-style meeting that includes learnings for mentees on topics like:

- Work-life balance
- Communication
- Time management
- Challenges and solutions to current problems

The wisdom mentors share during the meetings has left some of the most memorable impressions on the mentees.

"They [mentors] have taken the time to share their own career journeys and offered thoughtful advice about navigating careers in the public sector," one mentee wrote in a post-program survey.

PROGRAM STRUCTURE

The program's creative structure presented unique challenges and opportunities. A primary example is the transition period between working full-time and part-time. The procurement office refined its process to align mentor and mentee schedules better for when students return to school, ensuring no holes in contract management. Previously, the office attempted to rotate mentees to different projects to expose them to a broader swath of contract types. However, office leaders revised their approach to have the mentees stay with one project to acquire deeper knowledge in areas of interest.

To increase the chances of success, current mentees often take on the type of projects that have been successful for previous mentees. ***Rather than switching between projects, mentees switch between mentors, allowing full-time employees to share the workload.***

Additionally, a program coordinator makes a major positive difference. A primary example is Tirell, “Mr. T,” Honablew, the office’s Education Program Coordinator. Honablew manages the mentees’ daily schedules to meet the office’s needs best while facilitating optimum learning environments. Additionally, Honablew records and analyzes data from mentee surveys, administers the onboarding process, and has monthly check-in meetings.

“This foundation set the tone for the internship with my supervisors offering regular feedback and support on work assignments, as well as being understanding of my class schedule,” a mentee wrote.

GETTING WITH THE PROGRAM

The procurement office found little trouble seeking leadership buy-in due to a close relationship with the National Association of State Procurement Officials (NASPO). A staff member for the nonprofit organization who manages partnerships is in continuous contact with the state’s procurement office. The NASPO staff member is a direct line of contact for questions and could speak to the benefits of a mentorship-internship program, including the ability to mentor potential future employees. A NASPO mentee-intern first worked in the office in 2021, and the organization has funneled prospects to the state each year since.

While mentees have deeply embedded themselves in the North Carolina procurement office, the program also allows them to have space of their own among peers. Mentees’ desks are grouped together in a “pod.” With the MIMIC Minute meetings taking place around lunchtime, mentees often go to lunch together when the meetings conclude. Members of each program cohort typically refer to themselves under a team name.

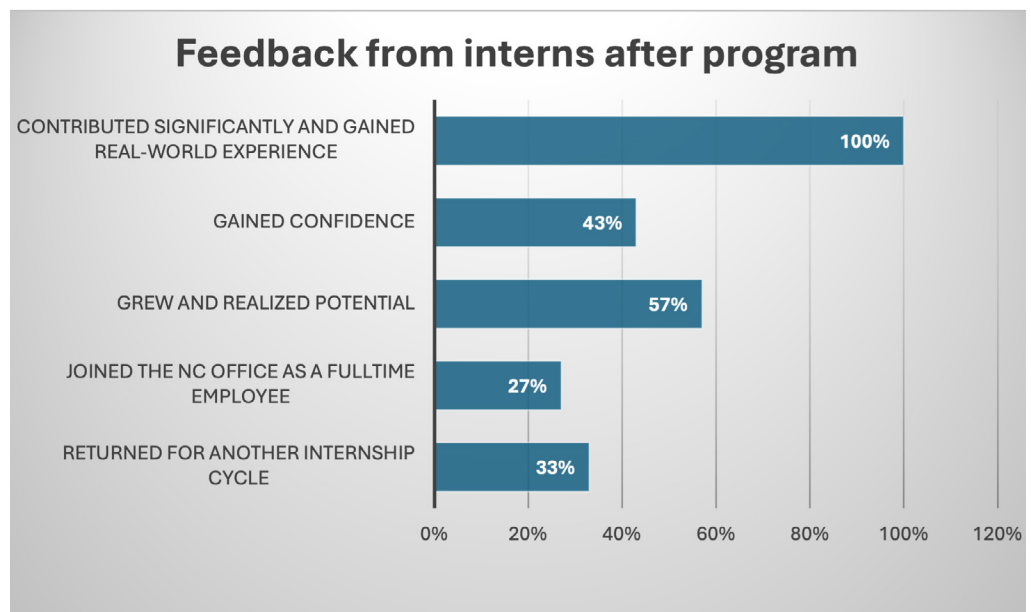
“When reflecting on my experiences with [the office], there are several reasons why I remained committed to the work, but above all, I stayed because of the culture,” one mentee said.

RESULTS

Of the 15 mentees that have participated since the program’s inception, five returned for another program cycle and four found full-time work in the state’s procurement office immediately after graduation.

Mentees appear to have taken notice of and appreciated the trust. Mentees wrote that they:

- “Felt part of the team, rather than temporary interns”
- “Knew more experienced employees believed in their potential”
- “Received incredible support”
- “Realized that public procurement was a career that [they] could see themselves growing in”



"From the beginning, they made it clear that they wanted this internship to be a learning experience, allowing me to make mistakes and encouraging me to ask questions," one mentee wrote.

The mentorship program has made numerous impacts on the office's culture. Employees are handpicked as mentors on a voluntary basis. Cleven said their selections offer them "bragging rights," as they are talked up around the office to create a sense of accomplishment. The goal is to organically mold the mentor position into a coveted one. The result: buy-in from employees to bolster the program in addition to their regular work. The strong culture had an impact on mentees, including one who wrote, "The established culture allowed me to consistently learn new things, with the entire division willing to share their knowledge and offer guidance on my career path."

If Cleven were to travel back in time to the program's launch and provide herself with advice, she would stress the importance of surveys. The program now surveys mentees after every cycle, but it did not after 2020. "That would have been really cool data to see how we grew," Cleven said. The figures have been encouraging:

- 100% of mentees said they contributed significantly and gained real-world experience, felt supported/valued/sense of belonging, and gained procurement awareness
- 57% grew and realized their potential
- 43% gained confidence

The North Carolina procurement office has established a mentorship-internship program that serves as a yearly pipeline for young professionals to work there full-time. Further, they have done so in a manner that does not require special resources, making it transferable to other states. The quote that succinctly puts into perspective the challenge that procurement offices face reads, ***"Before interning at [the office], I hadn't even heard of procurement," one mentee wrote.*** But this quote represents the mentees' mindset at the end of the program: ***"The work itself, combined with the personal growth, made staying on as a full-time employee a natural next step."***

MI: ON-DEMAND MENTORSHIP

for New Hires

Navigating the labyrinth of public procurement processes, terms, and deadlines can be overwhelming for new hires in procurement offices, especially in their first few weeks on the job. But the need for goods and services never ceases, and supervisors and mentors have a finite amount of time. How might state procurement offices thoroughly train new hires while allowing them to contribute as soon as possible? **Michigan Central Procurement Services (MCPS) has tackled this problem with rAMP UP! – a mentorship program geared for new hires, in which a detailed website takes much of the workload from mentors.** In short, the program can be considered on-demand mentorship.

AVOIDING AWKWARDNESS

Before the last few years, the MCPS office faced a challenge. New employees might have taken on significant work, like drafting a statement of work, within the first few weeks. For new hires who did not arrive with the necessary experience to complete such tasks, their first few weeks would be much less productive outside of some training tasks. The result was an awkward first few weeks for new hires and the office alike. Additionally, because contract managers can work in several offices within the state government, inconsistencies would arise from buyer to buyer or division to division.



- SOW Practice Activity Instructions
- SOW Aggregate Project Kickoff Notes
- SOW Writing Rubric

After completing the SOW modules, trainees write a practice SOW to demonstrate their learning.



SOW Practice Activity Binder

A “GUIDED TOUR”

To address this issue, the MCPS office developed the rAMP UP! program. Professional Development Manager Corinna Batora described the program’s structure as a “guided tour” of the office and the new hires’ job duties. While required for mentees, mentors may participate in the program voluntarily. If they decide to join, they earn credit toward their required five-year professional development recertification. The shared workload between supervisors, mentors, and the Professional Development Manager allows mentees to seek guidance even when mentors might not have the time or bandwidth to answer questions promptly. When mentees join the office at similar times, they often study together as they complete their training modules.

The MCPS office built a website as the central reference point for the mentorship program. It gathered input from a range of stakeholders, including employees with all experience levels, to ensure that the mentee training program meets the needs of everyone in the office. The design incorporates a multi-colored skateboarding theme to make the site more visually appealing. The site has numerous training materials available, including:

- An onboarding manual
- Office news
- Building maps
- Instructions on reserving conference rooms
- Emergency procedures
- Trivia questions
- Scavenger hunts to find places in the office
- Web-based trainings
- Job shadowing request forms
- Many other documents and forms

One full-time employee, along with others who work part-time, regularly updates the website as new materials become available and as policies and procedures change. The office built the website using software like Articulate 360 for Teams, SharePoint, and the Microsoft Office suite.

A “SAFETY NET”

The program offers comprehensive, self-paced learning modules that new hires, who quickly become mentees, can complete over the first three weeks of employment and beyond. Mentors collaborate with supervisors to offer guidance and regular check-ins.

“We want to be like your safety net,” Batora said. “We want you to be able to be comfortable asking questions that you don’t feel comfortable asking other people.”

Part of the “guided tour,” the website consists of more than a dozen modules along with a practice activity binder. Current training topics include:

- Procurement foundational concepts
- Getting started on a statement of work
- Navigating specific purchasing tasks in Michigan’s eProcurement system
- Completing a contract change notice
- Identifying and analyzing a contract portfolio
- Using the state’s contract database
- Cost modeling and pricing
- Using the state’s e-signature tool
- Preparing for and facilitating Joint Evaluation Committees

When they begin work, mentees receive a checklist of tasks to complete on a tentative schedule over three weeks, followed by additional learning materials to be completed sometime later. The mentees also have access to email templates for them to explain their progress and what they have learned before the mentor and manager review and provide feedback. The checklist includes a link to an extensive website with all of the necessary training materials.

Mentees are also paired with mentors early in the process based on experience, interests, and availability. Part of the manager or mentor’s role is to determine the schedule that best meets the needs of the employee and the office. Mentees in the hybrid-schedule office regularly communicate about training needs with supervisors, mentors, and the Professional Development Manager in Microsoft Teams chats. The program is individualized to each mentee, allowing them to complete trainings and daily work at an optimal pace for both the mentee and the MCPS office. Batora compares it to lying in a hammock: “You’re supported, but at any time, you can jump out.”



CLEAR RESULTS

The result of the thorough resources and productive culture has been clear, as the retention rate of new hires has increased to 100 percent. ***Since February 2023, all of the 12 buyers who joined the office have remained.*** This created significant cost savings because the office has not needed to rehire, a process that can add at least tens of thousands of dollars more to the office budget.

Michigan has found its solution to mentoring new hires, a solution that can largely be replicated by other states. The program continues to develop, becoming more formal as it builds. Many of the learning objectives, topics, activities, lessons, and others facets of the program are transferable to all state procurement offices. The software programs used to build the rAMP UP! website are accessible and relatively inexpensive. By using the website as a platform for its mentorship program, mentees can complete necessary trainings and answer questions, as mentors fill in any other gaps.

PA: PLANNING FOR MASS RETIREMENTS

Through Mentorship

Procurement managers in Pennsylvania faced a hurdle that will seem familiar to other procurement or government professionals—a staffing review found that 20 percent of their 90 staff members would be retiring within the next three years. The Pennsylvania procurement office expected six of those retirements to finalize in the next 15 months. While the turnover would be significant, Pennsylvania’s Chief Procurement Officer saw it as an advantage, because to her, retirements are easier to plan for than surprise departures. Through an innovative mentorship program, the office did just that.

HOW IT STARTED

To begin, managers within Pennsylvania’s Department of General Services’ Bureau of Procurement (the Bureau) convened not only to review upcoming retirement dates but also to visualize a timeline for developing an overarching plan. The initiative was part of a department-wide effort to address succession planning. Human resources (HR) staff provided managers with a report about upcoming retirement eligibility for their staff.

Managers devised a plan for the retiring employees to mentor their replacements for a lengthy period prior to retirement, and they would use NASPO professional development funds to help cover program costs. The plan sought to minimize disruptions in the Bureau’s work with repetitive retirements. They made a “murder board” — a large, physical list of each staff position that highlights upcoming retirements. Managers listed names on cards, divided them into bureau categories, hung them on the wall, and made notes next to individuals with upcoming retirement eligibilities. The Bureau’s Chief Procurement Officer still keeps a board in her office that she reorganizes as needed to identify new mentoring partnerships.

The “Murder Board”

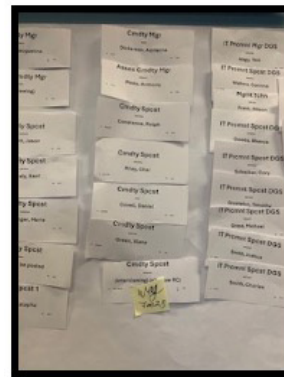


Figure 1: This “Murder Board” helped the bureau visualize retirements.

HOW IT WORKS

This mentorship helps support the Bureau’s ability to promote from within. The Bureau includes in each budget a floating full-time mentee position that allows it to pay the mentee’s new compensation. At the same time, if necessary, the Bureau can backfill the previous position. The new position held by the promoted or hired employee who shadows the retiring employee is considered a wage position. It officially becomes a salaried position once the retirement is official, but the classification offers flexibility to move it to various positions as needed. The mentee who shadows the retiring employee works under the same job title and compensation as they will have when the retirement is complete.

A Commodity Manager position, which is responsible for overseeing commodity teams, is the most used placement for the roving position. As the retirement draws nearer, the mentee is expected to assume an increasing amount of the mentor’s duties. Toward the end of the mentorship, the mentee performs the duties of the position, while the mentor fixes errors or answers remaining questions. After the retirement, the roving budgeted position can be temporarily discontinued or moved to another position.

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In March 2024, an employee within the Bureau who had worked there for 30 years announced a written retirement for October 2024. Kelly Martini, the Chief Procurement Officer, told the mentor that her goal was for her to be "bored" in her final week because the mentee will have assumed all responsibilities. "You will have nothing to do. You will be very excited to retire," Martini told her. The mentor only had four emails sitting in her inbox on the final day of work. "We were able to transition seamlessly," Martini said.

The primary steps for the program are:

1. Gather managers regularly to map out retirements within the next five years by using a "Murder Board."
2. Evaluate how each role fits into operations and how they might be altered.
3. Create a budgeted position that can rove as needed.
4. Work with human resources and other government departments to ensure "poaches" follow office rules and minimize disruptions to state departments.
5. Hire a candidate who will be mentored by the retiring employee.
6. Move the roving budget position to other areas as needed.

SOME CONSIDERATIONS

An important consideration with internal promotions is how to respectfully "poach" new candidates from other areas of the department. Department rules require that when managers interview candidates within the state, they inform the employee's current supervisor. If they hire the employee, the managers work together on matters such as start dates and how to complete leftover projects.

Also important to consider is the function of the position and how the work may change. Pennsylvania, for example, recently had a retiree who was considered a subject matter expert for the position. Managers gathered to consider how to hire for a position held by someone with extensive experience and expertise. Rather than attempt to fully replace the retiree, the Bureau worked with HR to reclassify the position to better align with the expected candidate pool.

A common instinct when replacing a position is to seek a new hire who will assume the position for a lengthy period. But the Bureau's mentorship process allows it to hire the best candidates, even if they will likely earn a promotion or move on quickly. For example, the Bureau has a Management Technician position that revolves frequently. The most recent three employees to hold the position have all been promoted within the organization. The position is now considered a useful vetting opportunity for potential in-house promotions.

CONCLUSION

Adding a mentorship program to prepare for mass retirements can be a straightforward process that improves procurement office operations. The implementation of the mentorship program brought major benefits to the Bureau. It allowed managers to:

- Plan thoroughly and flexibly for retirements
- Minimize productivity disruptions
- “Poach” employees respectfully
- Hire the best candidates, regardless of the potential duration of their time in the position
- Build significant competence and confidence for the employee who will be replacing the retiree
- Allow the retiree to wind down with a manageable workload
- Consider how each role fits into the Bureau’s operations

Pennsylvania’s Bureau of Procurement has built a sustainable model that keeps institutional knowledge alive and ensures a confident, capable workforce for years to come.