

Aquarian Trainer Academy POLICY

Interns, Associates and Professionals -- Changing Mentors

Every Intern, Associate and Professional has a Mentoring Lead Trainer whose responsibility it is to train them in all facets and responsibilities required for their level.

The purpose of this policy is to ensure that any change of mentor is done in a thoughtful, respectful and conscious manner; that there has been enough mutual reflection to ensure that there are valid reasons driving the change; and that the continuity of the training process is maintained.

Change of Mentor Process

- 1) The **current mentor and mentee** need to thoroughly discuss the reason(s) a change is necessary and agree on the transfer of mentorship. If for some reason the current mentor and mentee cannot mutually agree on the need or advisability of change, either may request facilitation from KRI.
- 2) The **mentee** then downloads from the KRI website the Change Mentor Request Form. In this form the mentee briefly describes the reasons for this change, who will be the proposed new mentor, and returns the first page of the form to KRI.
- 3) KRI will review and inform both the mentee, current mentor, and proposed mentor if the change process can proceed, or if more dialogue (with either or both the current and proposed new mentor) is needed first.
- 4) At some point in the process the **current mentor and proposed new mentor** are required to have a discussion together to ensure they both understand the reasons for the transfer and agree it is in the mentee's best interest. Depending on the circumstances, KRI may ask for this step early in the change process, or just before finalization.
 - a. The Current mentor shares with the New Mentor the mentee's progress based on the Trainer Competencies in the training program to date, noting areas of strength and weakness and specifying any areas which still need to be covered in the mentee's training.
 - b. Certain actions or requirements may be agreed to that the mentee must fulfill prior to transferring to a new mentor (e.g., completing any existing duties in an ongoing course, fulfilling all outstanding financial obligations, etc.). Any such agreements must be in writing, with a copy sent to KRI for the mentee's file.
 - c. The current Mentor makes sure that the mentee sends the New Mentor copies of the current Competency Evaluation Form, Units of Study - Content Credit Form and Individual Development Plan
- 5) Once KRI verifies that the change of mentor process can proceed then the **mentee and the new mentor** are required to complete the following documents together:
 - a. Mentor/Mentee Operating Agreement

- b. Competency Evaluation Form
 - c. Individual Development Plan (IDP).
- 6) The **New Mentor** is required to:
- a. Send a written statement to KRI accepting the new mentee and acknowledging they have had direct communication with the current mentor.
- 7) After receiving the required forms, KRI will review and reply by email to the mentee and New Mentor.

IMPORTANT NOTES:

- a. If this is the third mentor for this mentee, so this is the 2nd request to change mentors, then the mentee will be interviewed by a team appointed by the ATA Executive Director and the request will be reviewed for approval by the Certification Committee.
- b. Before recommending a mentee to move to the next level of the Academy, a new Mentoring Lead must have actively mentored the mentee through at least one full Level One program.

*Approved by TTEC and confirmed by DOT / Academy Director September 16, 2007.
Updated 10/1/2014, 4/15/16, 6/12/16 tts, and 10/31/17 ask.*