



WOMEN IN PUBLIC FINANCE

## MENTORSHIP PROGRAM

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***Please send all Mentorship Program correspondence to [Mentorship@WPFC.com](mailto:Mentorship@WPFC.com)***



## WPF MENTORSHIP PROGRAM OUTLINE

### WPF MENTORSHIP PROGRAM INTRODUCTION

Mentorship is one of the most important tools for professional development and has been linked to greater productivity, career advancement, and professional satisfaction. Women in Public Finance (“WPF”) recognizes that mentorship is critical in helping to nurture and grow future leaders, maintain current industry leaders modernized; and, that a mentorship program is a key opportunity to engage new and existing members.

The WPF Mentorship Program (“Program”) seeks to establish mentoring relationships between WPF Members.

### WHAT ARE THE GOALS?

The WPF Mentorship Program aims to promote career and leadership development. WPF Member Mentors will have opportunities to further develop leadership skills and learn about emerging trends from the next generation of their peers. Member Mentees will gain a trusted colleague and learn methods for career advancement. All parties will form professional relationships and share advocacy, professional, and research interests.

**PROGRAM MISSION STATEMENT** - The Women in Public Finance Mentorship Program aims to support the Women in Public Finance mission of providing opportunities to advance the careers of women in the public finance industry by developing and facilitating a structured and guided mentorship program that will foster supportive professional relationships.

**PROGRAM OBJECTIVES** - A Forward and Reverse Mentorship Program focused on the formation of integral mentorship relationships so that Women in Public Finance Members may further develop their knowledge of the industry, unique skillsets and leadership skills. The program will also offer scholarship recipients a mentor within Women in Public Finance and further promote relationships and networking between Chapters and other Committees.

### The Mentorship Program will:

- i) establish mentorship teams located within the same geographic region;
- ii) coordinate regular subject matter driven events;
- iii) develop accountability metrics
- iv) develop continuous program evaluation and improvement processes

## WPF MENTORSHIP PROGRAM ORIENTATION MATERIAL

### HOW DOES IT WORK?

WPF Members wishing to apply will complete a Mentorship Program Application by visiting the web site [www.wpfc.com](http://www.wpfc.com), clicking on the Membership tab and selecting "Mentorship" from the drop down menu. The Application collects contact information as well as career/function, years in the industry, matching preferences, personal interests, and other information to facilitate the matching process between Mentor and Mentee.

The Mentorship Committee will recommend Mentor/Mentee pairs. The Mentorship Pairs will have the ability to meet in person (if a local match is made) or use one of several online tools to meet virtually.

The Mentorship Committee is comprised of several roles given each committee members' strengths and interests to successfully guide the Mentorship Program. The **Grouping/Relations Leader** creates a Matching Sub-Committee that leads the Matching Process. Once the full committee has approved the Matches recommended by the Sub-Committee, Mentoring Program Congratulations and Welcome Letters will notify program participants of their selection into the Mentorship Program and connect them to their mentorship partners.

Once applicants pair up, they will enter into a confidentiality agreement and go through a brief orientation/information session to review basic guidelines and begin their program. A **Relationship/Accountability Guide** will be available to facilitate the progress of the program. The mentorship relationship will last 9 months.

A completion ceremony will take place at the Annual Conference for the Program Participants. Input from the participants' experiences will be obtained and followed up on by the **Program Track and Measure Leader**. This information will be used to measure success and enable continuous improvement and vision development.

### WHAT IS THE TIME COMMITMENT?

Participants are requested to commit to the Program for 9 months. *As the Program progresses we hope to offer opportunities for short-term "flash" mentoring as well as "team style" mentoring.* Mentors/Mentees will be asked to schedule regular meetings to discuss Mentor/Mentee goals, objectives, and mentorship progress. Each member will be provided certain forms that are designed to help the program stay on course and on schedule. Mentors/Mentees are expected to be respectful of each other's time, availability, and answer all communications in a timely manner.

### WHO CAN PARTICIPATE?

All national WPF members are invited to participate. Due to the nature of the Mentorship Program, the participants will initially be limited to 20-25 pairs.

### HOW DO I GET INVOLVED?

Interested WPF Members can submit an application with their request to participate in the Program to: [mentorship@wpfc.com](mailto:mentorship@wpfc.com). Once WPF membership is verified, the applicant will receive an email confirming acceptance into the participant pool. When matched, the applicant will receive an invitation that provides further instructions. Please note that, due to the nature of the process, we cannot guarantee that all applicants will be matched. For more information on the WPF Mentorship Program, please send an email to: [mentorship@wpfc.com](mailto:mentorship@wpfc.com).



## MENTORSHIP PROGRAM PARTICIPANT GUIDELINES

### MENTOR OVERVIEW

Mentors are professionals who **guide** and **advise** mentees in their career paths to help them succeed. The role of a mentor is to inspire, encourage, and support mentees, and to contribute to their professional and personal development.

### FREQUENTLY ASKED QUESTIONS

- ***What am I expected to do?*** Mentors are expected to provide their mentee with about one hour of support and interaction per month. Most of this interaction will take place via email, phone and other web-related tools (for example, Zoom) or face-to-face meetings, as appropriate. Mentors should work with their mentees to determine what kind of support will be most useful—specific feedback related to finding jobs, general career advice, information on higher studies, technical information, personal development/encouragement, work/personal life balance, etc.
- ***How long will the commitment be?*** We ask our Mentors to make a 9-month commitment in order to ensure that you and your Mentee are both able to fully benefit from the relationship. If a mentor must leave the relationship early, we request at least one month's notice in order to search for an appropriate replacement.
- ***Are there any potential risks to me or my company?*** No. It is not appropriate for mentors to engage in any business transactions with their mentees; instead, the relationship should only involve the flow of general information and advice.
- ***If the relationship is not going as planned or I am concerned about the mentorship relationship, what should I do?*** We encourage advising the mentee about the situation and to contact the **Relationship/Accountability Guide** via [mentorship@wpfc.com](mailto:mentorship@wpfc.com) immediately. We will provide our full support to resolve the situation in a positive and satisfactory manner.

## **MENTOR DOs**

1. Commit to at least one interaction per month.
2. Take responsibility to initiate the relationship.
3. Set aside time for the mentoring process and honor all appointments.
4. Invite the mentee to meetings or activities, as appropriate.
5. Schedule meetings with planned topics.
6. Be flexible on meeting times and places.
7. Arrange frequent contacts via telephone, email, FaceTime, Zoom, Skype, etc., as appropriate.
8. Respond to emails from your mentee as timely as possible and at least within 2 days of receipt.
9. Maintain confidentiality. Keep information that your mentee has shared with you confidential. If something concerning the mentee needs to be discussed with others, it should first be discussed within the mentorship relationship.
10. Establish an open and honest dialogue and a setting for idea exchange.
11. Nurture creativity and independence. Help build self-confidence and offer encouragement.
12. Provide honest, constructive and timely feedback to your mentee.
13. Provide opportunities for the mentee to speak about concerns and ask questions.
14. Above all, listen.

## **MENTOR DON'Ts**

1. Try to give advice on everything.
2. Encourage mentee to be completely dependent upon you.
3. Provide your personal history, problems, animosities, successes, failures, etc. UNLESS they are constructive to a topic of conversation.
4. Be too busy when the mentee needs your friendship or support. If you do not have time, communicate with your mentee and schedule an alternative time they can reach you.
5. Criticize.

## MENTEE OVERVIEW

Mentors can inspire, encourage, support, and contribute to your professional and personal development. You can expect to strengthen and build your network and gain the skills and confidence necessary to excel. You should also contribute to your Mentor's development by providing insight into emerging trends and new technologies.

## FREQUENTLY ASKED QUESTIONS

- ***How do I choose a Mentor?*** First, complete the Mentorship Program Application and submit to [Mentorship@wpfc.com](mailto:Mentorship@wpfc.com). On an annual basis, the Mentorship Committee will recommend Mentor/Mentee pairs. The Mentorship Pairs will have the ability to meet in person (if a local match is made) or use one of several online tools to meet virtually.
- ***How long will the commitment be?*** We ask that our Mentees make a commitment of 9 months in order to ensure that both you and your Mentor are able to fully benefit from the relationship. If a Mentee must leave the relationship early, we request at least one month's notice in order to search for an appropriate replacement.
- ***If the relationship is not going as planned or I am concerned about the mentorship relationship, what should I do?*** We encourage advising the mentor about the situation and to contact the ***Relationship/Accountability Guide*** via [mentorship@wpfc.com](mailto:mentorship@wpfc.com) immediately. We will provide our full support to resolve the situation in a positive and satisfactory manner.

## MENTEE DOs

1. Take a proactive role in shaping the relationship.
2. Understand what you want to gain from the mentoring relationship and communicate your goals and aspirations to your mentor.
3. Balance a personal and professional relationship with your mentor.
4. Set aside time for the mentoring process and keep all scheduled appointments with your mentor.
5. Maintain professional and courteous communications.
6. Use the time with your mentor efficiently. Prepare topics of discussion ahead of time.
7. Respond in a timely manner to your mentor's feedback but not more than 2 days after receipt.
8. Maintain an open and honest dialogue with your mentor about your challenges and weaknesses.
9. If something concerning the mentor needs to be discussed with others, it should first be discussed within the mentoring relationship.

## MENTEE DON'Ts

1. Ask for advice on everything.
2. Blame the mentor if their advice does not work out.
3. Expect the mentor to know all the answers.
4. Commit yourself to obligations you cannot keep.
5. Cancel meetings/visits with your mentor at the last minute.



WOMEN IN PUBLIC FINANCE

## WPF MENTORSHIP PROGRAM TOOLS

### APPLICATION

Desired Role: Mentor \_\_\_\_\_ Mentee: \_\_\_\_\_

Name:		Date:	
Title:		Phone:	
Organization:		Email:	
Years in Current Position:		WPF Chapter:	

#### Professional Attributes:

Career / Function	Role	Years in Industry
Asset Manager		
Attorney		
Commercial Banker		
Bond Insurer		
Financial Advisor		
Institutional Investor		
Issuer		
Investment Banker		
Rating Agency		
Sales, Trading & Underwriting		
Trustee		
Other		

1. Would you be interested in a virtual mentorship program?
  - a. Yes
  - b. No
  - c. If no, why not? \_\_\_\_\_

2. When matching, what is most important to you?
  - a. Industry/Career similarities
  - b. Personal interests
  - c. No preference
  - d. Geographic location
  - e. Other \_\_\_\_\_
3. What profession/industry role do you think would be an ideal match for you as a mentor/mentee?
4. Are there any professions you do not/should not be matched with?
5. Why do you want to participate in a Mentorship Program?
6. Describe your strongest competencies (i.e., technical and general knowledge, skills and abilities).
7. What do you think your Mentorship partner can gain from you?
8. Describe competencies you would like to strengthen thru the Mentorship Program.
9. What are your interest and hobbies outside of work?
10. List your Personal Attributes

Please submit your completed application to [Mentorship@WPFC.com](mailto:Mentorship@WPFC.com)



## CONFIDENTIALITY AGREEMENT

Trust is one of the most, if not the most, important factor in the partnership. Mentorship pairs will share information about one another throughout the relationship.

Partners must be very clear on the limits they want to place on the information shared. Establishing clear boundaries is a big step toward building trust.

Here are a couple of statements to start your agreement. You may accept these as they are, build upon them, or establish a completely new agreement. The important thing is that both partners concur with the confidentiality agreement.

1. What we discuss will stay between the two of us, unless we agree that the information can be shared with others. [Use the space below to add to this.]

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2. Add other additional conditions you both mutually agree to.

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Mentor signature

date

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Mentee Signature

date

## GOAL/ACTION PLAN

With your Mentor/Mentee, set goals that are focused, realistic, and tied to your competency goals. For example, effective goals should be **SMART**:

<b>S:</b>	Specific
<b>M:</b>	Measurable
<b>A:</b>	Achievable
<b>R:</b>	Results-oriented
<b>T:</b>	Time based

**Mentee Action Plan** - Focus on competencies important to your organization. Build on your strengths as well as your weaknesses. Look for opportunities to learn by *doing* as well as *observing* and *listening*. Below, is a sample action plan to help guide you in establishing goals for the relationship. Use one for each goal.

Mentoring Goal

#1: \_\_\_\_\_

<b>Competency: What specific skill do I want to develop?</b>	<b>Learning Activity: What action will I take to develop this skill?</b>	<b>Beginning date and ending date</b>	<b>My co-workers and supervisor will see the following...</b>	<b>I know I have achieved my goal when...</b>

## MEETING LOG

Date	Time	Competency Discussed	Action Plan Step	How & When Completed

## MID-POINT EVALUATION FORM FOR MENTORS

**Mentor Name:** \_\_\_\_\_

**Mentee Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How has your overall experience with the Mentorship Program been so far?

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2. Do you feel the resources provided by the Mentorship Program Orientation adequately informed you of your role as a Mentor?

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3. Have you and your Mentee been able to build a comfortable working relationship?

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4. Do you think reviewing your Mentee's Application was helpful in learning how you two could work together? Why or why not?

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## MID-POINT EVALUATION FORM FOR MENTORS (CONT'D)

5. Do you think the Action Plan and Mentoring Log were helpful in keeping your meetings on track?  
Why or why not?

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6. Please share additional comments here:

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## MID-POINT EVALUATION FORM FOR MENTEES

**Mentee Name:** \_\_\_\_\_

**Mentor Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How has your overall experience with the Mentorship Program been so far?

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2. Do you feel the resources provided by the Mentorship Program Orientation adequately informed you of your role as a Mentee?

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3. Have you and your mentor been able to build a comfortable working relationship?

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4. Are you able to learn from your Mentor's experience and background?

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## MID-POINT EVALUATION FORM FOR MENTEES (CONT'D)

5. Do you think reviewing your Individual Action Plan with your Mentor will help you achieve your goals? Why or why not?

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6. Please share additional comments here:

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## FINAL EVALUATION FORM FOR MENTORS

**Mentor Name:** \_\_\_\_\_

**Mentee Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. Briefly give an overall description of your experience with the Mentorship Program.

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2. Do you think this program helps your mentee develop the skills knowledge needed to take on larger roles and more challenges? Why or why not?

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3. Which part of the mentoring experience do you feel was the most useful in helping the mentee reach their stated goals? Was there an element that you felt was not useful?

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4. Would you recommend this experience as a mentor to a colleague? Why or why not?

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## FINAL EVALUATION FORM FOR MENTORS (CONT'D)

5. Are you interested in serving as a mentor again? Why or why not?

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6. Please share additional comments here:

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## FINAL EVALUATION FORM FOR MENTEES

**Mentee Name:** \_\_\_\_\_

**Mentor Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_

1. How has your overall experience with the Mentorship Program been so far?

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2. Do you feel the resources provided by the Mentorship Program adequately prepared you for your role as a Mentee?

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3. Have you and your mentor been able to build a comfortable working relationship?

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4. Are you able to learn from your Mentor's experience and background?

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## FINAL EVALUATION FORM FOR MENTEES (CONT'D)

5. Do you think reviewing your Individual Action Plan with your Mentor will help you achieve your goals?

Why or why not?

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6. Please share additional comments here:

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## CRITICAL DATES

January 2020	Congratulations and Welcome Letters Distributed
Jan/Feb 2020	Deadline for Confidentiality Agreement emailed to <a href="mailto:Mentorship@WPFC.com">Mentorship@WPFC.com</a>
Jan/Feb 2020	Relationship Guide/Accountability Leader to contact all participants
March 2020	Perform first follow up
May 2020	Mid-Point Evaluations
August/Sept 2020	Final Evaluations – Relationship Guide/Accountability Leader and Track/ Measure Success Leader
Annual Conference 2020	2020 Class Meet and Greet Event and Completion Ceremony