

Mentoring Program

12-Month Mentorship Guide



**Tristate
Mentorship
Match**

A collaboration with the Minnesota, Montana & Wisconsin leagues



Table of ***Contents***

- Welcome Message
- Monthly Overview
- Monthly Notes
- Next Steps and Next Meeting Scheduling

Welcome ***Message***

The following pages have been created to provide a high-level discussion or guiding tool for the mentoring relationship. Each month has an overview geared toward what the monthly meeting could focus on, items for the mentee to consider, items for the mentor to consider, and outcomes for the monthly meeting.



Please note: these are simply guidelines and ideas that have created to assist in facilitating monthly mentor/mentee conversations. Each pairing should decide what works best for them.

It should be expected that the mentee owns the agenda and the responsibility for laying the foundation of the mentor/mentee relationship, as they are the ones that are ultimately looking to gain from the program.

Each pairing should also discuss what works best for their meetings, for example, are you planning to meet over a video call service like Zoom, or GoToMeeting, will you be using a tool such as FaceTime, or will you be chatting over the phone? If you are relatively close to one another, will you be attempting to connect in person? Those arrangements should be discussed when the next meeting is scheduled.

Month *One*



Overview

Orientation; Kick-off by mentoring captains and an informal icebreaker. Get acquainted with each other and ask questions. Discuss the program, the roles of each person, etc. Mentees and mentors will be paired.



Mentee to Consider

Share your background, and what you are looking for and why, as a mentee in the mentoring relationship. Leverage parts of the application for this area, such as sharing what your roles and responsibilities are at your credit union.



Mentor to Consider

Share your background and why you wanted to be a mentor in the mentoring relationship. Leverage parts of the application for this area, such as sharing what your roles and responsibilities are at your credit union.



Outcomes

Determine your future meeting schedule. Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

Month One

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

Month *Two*



Overview

In this session, the mentee and the mentor will align their goals and formalize the goals and desires of the mentee. Discussion idea for the mentee: what are up to three professional development goals you want to work on during the program? Share this with your mentor during this meeting.



Mentee to Consider

What are your short-term (one to five years) and long-term (more than five years) goals for your career and why? What skills would you like to develop during the mentoring program?



Mentor to Consider

What is the best way you can help your mentee work to accomplish their goals during the program?



Outcomes

Settle on one goal from the list and focus on that goal first. Prepare to discuss it at the next session. Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

Month Two

Notes

[illegible]



This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface.

Month *Three*



Overview

Use this month's meeting to focus on the first professional development goal that was identified during the last time you met. Discussion ideas could include: Why is this a goal? Why is this important to you? What specifics do you need support or guidance on?



Mentee to Consider

Depending on your goal, share examples of situations with your mentor when it has worked well or not worked well for you. Discuss with the mentor how you will know that you have made progress on your goal.



Mentor to Consider

Ask your mentee probing questions, share experiences or instances when you may have encountered a similar situation, etc. How will you measure progress on your goal?



Outcomes

What is the one thing that the mentee will do or try before the next meeting?

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

Month Three

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

Month *Four*



Overview

During this meeting the mentee should update the mentor on the progress made toward the first professional development goal that was identified at the last meeting. Discussion ideas: The mentee can share what happened in the last month, based upon the conversations from the previous session, and share how they are incorporating lessons learned thus far in their day-to-day work.

Mentee to Consider

Have you identified any new challenges in your day-to-day work or in other areas of your life?
What are the latest advancements around your professional development goals?
How are things going with the goal you identified as your priority?
What competencies do you need to develop to meet your priority goal?
Are there other work-related issues that you would like to work on with your mentor (e.g. work-life balance, difficult manager/co-worker)?

Mentor to Consider

Consider asking your mentee what is the next opportunity they might have to begin to practice this competency either on the job or in their personal life?

Outcomes

What specific actions might you take to begin developing particular competencies consistent with this goal?
What is the one thing that the mentee will do or try before the next meeting?
Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

Month *Five*



Overview

This month's meeting is an opportunity for in-depth exploration surrounding professional development goal number one.

Discussion ideas: Mentees and mentors can continue their discussion on how the mentees can practice strategies to address their identified priority goal.

Mentee to Consider

Update your mentor with how you think the program is going so far.

How are you incorporating lessons learned thus far into your day-to-day work?

Have you identified any new challenges in your work or other areas of your life?

Did you test any of the development ideas that have been discussed in the last meeting? What worked? What didn't work?

Mentor to Consider

Ask your mentee probing questions and share experiences or times when you may have encountered the same types of situations, if applicable.

Outcomes

Begin the discussion and identification of a second goal and determine what support the mentee will need to achieve that goal.

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.



Month Five

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

Month *Six*



Overview

This month is a key milestone during the mentoring program process, as the first and second development goals are examined and the program, to date, is evaluated.

Discussion ideas: Mentees and mentors can continue their discussion on how the mentees can practice strategies to address their identified priority goal.

Mentee to Consider

Update your mentor with how you think the program is going so far.

How are you incorporating lessons learned thus far into your day-to-day work?

Have you identified any new challenges in your work or other areas of your life? In what ways are you more aware of your organizational role in your department?

What are you doing differently?

Mentor to Consider

Help your mentee by reviewing the progress so far.

How are you progressing with the one goal we identified? Do you need additional guidance from me, the mentoring program, your credit union's management team or other colleagues?

What thoughts do you have about your long-term career goals and strategies that we discussed earlier in the program?

Outcomes

You should have an evaluation of the progress in the program thus far, and be able to assess how the mentee is feeling about their progress to their goal(s).

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Month *Seven*



Overview

Now is the time to make course corrections based on the feedback from the mid-program evaluations and finalize the third goal.

Discussion ideas: Mentees and mentors can continue their discussion on how the mentees can practice strategies to address the goal identified in month three.



Mentee to Consider

Update your mentor with how you think the program is going so far; are you feeling comfortable or confident in how you are progressing to your goal?

How are you incorporating lessons learned thus far into your day-to-day work?

Continue to identify any new challenges in your work or other areas of your life. In what ways are you more aware of your organizational role in your department?



Mentor to Consider

Ask your mentee if they have tested any of the development ideas that have been discussed since the last meeting. If so, what was effective? What was not effective?

If applicable, last month you may have discussed competencies. How have you moved to mastering them over the last month? When will be your next opportunity to practice those competencies? How will you know if you have made progress toward your goal, and how can we measure progress?



Outcomes

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.





This image shows a full page of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page, typical of notebook paper. There are no margins, text, or other markings on the page.

Month ***Eight***



Overview

Use your time together to update one another: What progress have you made toward meeting your goals? What are some specific strategies for addressing your goals? What specific actions might you take around these goals? What are some opportunities to practice competencies on-the-job to help you meet your three goals?



Mentee to Consider

Update your mentor with how you think the program is going so far; are you feeling comfortable or confident in how you are progressing to your goal?

How are you incorporating lessons learned thus far into your day-to-day work?

Update your mentor on any new challenges you may have identified since your last meeting in your work or other areas of your life. In what ways are you more aware of your organizational role in your department?



Mentor to Consider

Ask your mentee if they have tested any of the development ideas that have been discussed since the last meeting. If so, what was effective? What was not effective?



Outcomes

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

Month Eight

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

Month *Nine*



Overview

Use your time together to update one another: What progress have you made toward meeting your goals? What are some specific strategies for addressing your goals? What specific actions might you take around these goals? What are some opportunities to practice competencies on-the-job to help you meet your three goals?



Mentee to Consider

Update your mentor with how you think the program is going so far; are you feeling comfortable or confident in how you are progressing to your goal?

How are you incorporating lessons learned thus far into your day-to-day work?

Update your mentor on any new challenges you may have identified since your last meeting in your work or other areas of your life. In what ways are you more aware of your organizational role in your department?



Mentor to Consider

Ask your mentee if they have tested any of the development ideas that have been discussed since the last meeting. If so, what was effective? What was not effective?



Outcomes

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

Month Nine

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

[illegible]

Month *Ten*



Overview



Use your time together to update one another: What progress have you made toward meeting your goals? What are some specific strategies for addressing your goals? What specific actions might you take around these goals? What are some opportunities to practice competencies on-the-job to help you meet your three goals?

Mentee to Consider



Update your mentor with how you think the program is going so far; are you feeling comfortable or confident in how you are progressing to your goal? How are you incorporating lessons learned thus far into your day-to-day work? Update your mentor on any new challenges you may have identified since your last meeting in your work or other areas of your life. In what ways are you more aware of your organizational role in your department?

Mentor to Consider



Ask your mentee if they have tested any of the development ideas that have been discussed since the last meeting. If so, what was effective? What was not effective?

Outcomes



Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

Month Ten

Notes

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins or other markings on the paper.

Month ***Eleven***



Overview

Use your time together to update one another: What progress have you made toward meeting your goals? What are some specific strategies for addressing your goals? What specific actions might you take around these goals? What are some opportunities to practice competencies on-the-job to help you meet your three goals?



Mentee to Consider

Update your mentor with how you think the program is going so far; are you feeling comfortable or confident in how you are progressing to your goal?

How are you incorporating lessons learned thus far into your day-to-day work?

Update your mentor on any new challenges you may have identified since your last meeting in your work or other areas of your life. In what ways are you more aware of your organizational role in your department?



Mentor to Consider

Ask your mentee if they have tested any of the development ideas that have been discussed since the last meeting. If so, what was effective? What was not effective?



Outcomes

Leave this meeting with your next session scheduled (date, time, location/application). Scheduling the session is the mentee responsibility.

[illegible]



This image shows a single sheet of white paper with horizontal blue or grey ruling lines. The lines are evenly spaced and run across the width of the page. There are approximately 20 lines visible. The paper has a slight shadow on the right side, suggesting it's resting on a surface.

Month *Twelve*



Overview

This month will be the final meeting. Use this session to recap and discuss your experiences in the program, and future goals that will continue to guide your development. How can you make your successes stick? What will be next? When should you review and revise your goals?



Mentee to Consider

How do you plan to continue working toward your goals after the mentoring program has finished? What is your greatest takeaway from the program?

Do you feel that you have some concrete strategies for continuing your professional development after the mentoring program?

How would you rate the overall progress toward each of your professional development goals, and why? What additional actions are necessary to continue your professional development (e.g. shadowing, training, etc.) How can you pursue these opportunities?



Mentor to Consider

How has this program and the work you have done with your mentee helped you in your own career?



Outcomes

The program has concluded.

This image shows a single sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.



This image shows a full page of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page, leaving small margins at the top and bottom. There are no vertical margin lines or other markings on the page.