

Mentoring Program

Program Policies & Procedures



Tristate Mentorship Match

A collaboration with the Minnesota, Montana & Wisconsin leagues



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About the *Program*



Background & Mission Statement

The Minnesota Credit Union Network, Montana's Credit Unions, and the Wisconsin Credit Union League (the Leagues) have developed the Tristate Mentorship Match Program (Program). The Program is designed to build, grow, support and inspire credit union professionals in their careers and commitment to the credit union movement. The Program will coordinate and facilitate mentorship relationships (Relationship) for mentors and mentees (Participants).

Vision Statement

The Program envisions Relationships based upon commitment, common goals and expectations, and mutual trust and respect, in which both the mentee and mentor grow in the process.

Participant Roles & Responsibilities

Details regarding Participants' roles and responsibilities are expressed in other documents: Mentor Roles and Responsibilities, Mentee Roles and Responsibilities, the Mentoring Agreement and 12-Month Mentorship Guide. All of which are published and available each league's website. The Leagues are providing the mentoring opportunity. However, the success of the Program, including the success of the Relationships is highly dependent upon the commitment of the Participants.

Program Facilitation

The Leagues will together provide overall program logistics; including program communication; registration support; program planning; and legal counsel. The Leagues' Staff Liaisons are charged with development of the Program; matching Participants; monitoring progress; and evaluation. The Leagues will name a Program Coordinator to be the primary contact for Participants.



Program *Policies*

- Eligibility Policy
- Screening Policy
- Matching Policy
- Confidentiality Policy
- Code of Conduct
- Reporting Policy
- Evaluation Policy

Eligibility *Policy*



To be considered for participation in the Program as a mentor or mentee a person must meet the following eligibility criteria:

- To participate as a mentee, one must be a currently employed at a Minnesota Credit Union Network, Montana's Credit Union, or Wisconsin Credit Union League member credit union, and pay the participation fee;
- To participate as a mentor, one must be a current or retired employee of a Minnesota Credit Union Network, Montana's Credit Union, or Wisconsin Credit Union League member credit union, or a credit union system partner;
- Be at least 18 years of age;
- Complete and submit the applicable application profile and agree to all the terms of the application; and
- Agree to abide by the applicable role and responsibilities, the Program Policies and Procedures, and execute the Mentoring Agreement.

Screening *Policy*



Prior to admission into the Program, each applicant shall be screened by the Leagues. Meeting the eligibility criteria above does not guarantee anyone admission into the Program. Admission into the Program will be at the sole discretion of the Leagues based upon eligibility, fit and any other criteria or characteristics deemed important.

Matching *Policy*



Mentors and mentees shall be matched by the Leagues based upon the following criteria, the order of which is not indicative of importance:

- Career/Skill goals of mentee
- Mentor areas of expertise
- Common interests
- Preferences/limitations related to meeting

The Program Coordinator or a League's Staff Liaison will personally check-in with each Participant periodically to see how the Relationship is going. This check-in will include gathering information on mentoring activities in which the Participants have engaged.

Participants should attempt to resolve any match difficulties or discord amongst themselves first. If for any reason that is not possible, either Participant should communicate issues or concerns with the Relationship to the Program Coordinator or their League Staff Liaison, who will take appropriate action to resolve any issues or concerns. Participants who wish to end the Relationship for any reason should contact the Program Coordinator or League Staff Liaison.

In the event a mentor or mentee leaves their position and are no longer eligible per the eligibility policy as noted above, the Leagues will attempt to re-match the remaining participant, however, a rematch is not guaranteed.

Confidentiality *Policy*



Confidentiality is critical in a mentoring relationship. The protection of confidentiality will be the responsibility of the Participants, the Program Coordinator and the Leagues. Participants shall abide by the confidentiality provision in the Mentoring Agreement. The Program, Program Coordinator and the Leagues shall limit the sharing information on a need-to-know basis to facilitate the operation of the Program. The Program may use Participants' names, images and other non-sensitive information to promote the Program. This policy is not meant to protect the confidentiality of information regarding the misconduct of any Participants.

Code of ***Conduct***



Participants are expected to conduct themselves with the highest level of professional and ethical behavior. The Program will not tolerate any behavior that does not meet that standard. Inappropriate behavior includes, unwelcome advances, hostility, demeaning or exploitive conduct of either a sexual or non-sexual nature. This is not an exhaustive list. Any conduct or behavior the Program deems inappropriate or unacceptable will result in disciplinary action including, suspension or termination from the Program.

Reporting ***Policy***

Participants must report any inappropriate behavior or conduct of other Participants. Reports may be made to the Program Coordinator, or League Staff Liaisons, who then will take appropriate action.

Evaluation *Policy*



Evaluation will be a key component in measuring the Program's success and for making continuous improvements in the effectiveness and delivery of mentoring services.

Evaluation data will be collected from mentors and mentees at the end of every Relationship. The Leagues will be responsible for evaluation efforts, including the creation of a method to gather information from Participants, analyzing the information collected from evaluations and making changes to the Program based upon such information.



Mentee *Roles & Responsibilities*

Your development depends on exploring career aspirations, strengths and weaknesses, collaborating on means to “get there,” implementing strategies, and evaluating along the way. Your mentor will provide the “light” for you to follow. Learning from the wisdom and past experiences of your mentor will serve you well and produce great benefits. Here are a few roles and responsibilities to help you in the process:

- Commit to your development
- Assume responsibility for acquiring or improving skills and knowledge
- Discuss your goals with your mentor
- Be open and honest on your goals, expectations, challenges and concerns
- Actively listen and question
- Build a supportive and trusting environment
- Seek advice, opinion, feedback, and direction from your mentor
- Ask questions!
- Be open to constructive criticism/feedback and ask for it
- Come to your meetings prepared with a clear idea of what topics or issues you want to address
- Take the lead on scheduling meetings
- Respect your mentor’s time and resources
- Apply what you learn from your meetings back on the job
- Keep your supervisor informed of the process and your progress
- Give feedback to your mentor on what is working or not working in the mentoring relationship



Mentor *Roles & Responsibilities*

Development of your mentee depends on exploring career aspirations, strengths and weaknesses, collaborating on means to “get there,” implementing strategies, and evaluating along the way. You as the mentor provide the “light” for the mentee to follow. Sharing your wisdom and past experiences is what the mentee looks for from you.

Here are a few roles and responsibilities to help you in the process:

- Support the mentee’s development of professional and interpersonal competencies through strategic questioning, goal setting, and planning
- Create a supportive and trusting environment
- Agree to, and schedule uninterrupted time with your mentee
- Stay accessible, committed, and engaged during the length of the program
- Actively listen and question
- Give feedback to the mentee on his/her goals, situations, plans and ideas
- Encourage your mentee by giving them genuine positive reinforcement
- Serve as a positive role model
- Provide frank (and kind) corrective feedback if necessary
- Openly and honestly share “lessons learned” from your own experience
- Keep discussions on track
- Respect your mentee’s time and resources
- Seek assistance if questions arise that you cannot answer



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