



# AFWA Mentor Mentee Program

COME GROW WITH US!



Accounting & Financial Women's Alliance  
CONNECT • ADVANCE • LEAD



The mission of the Accounting & Financial Women's Alliance is to enable women in all accounting and finance fields to achieve their full personal, professional, and economic potential and to contribute to the future development of their profession.

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# Introduction

## *Why Start a Mentoring Program?*

- Mentors are a powerful force for developing and retaining members within AFWA, with helping new members feel welcome, building relationships, act as a sounding board and sharing expertise knowledge to help a person grow personally and achieve milestones in their careers.
- Establishing a mentoring program can be relatively easy and worth the time spent when you see milestones reached by your mentee.
- Types of mentoring include:
  - Informal mentoring program
  - Formal mentoring program
  - One-on-One mentoring
  - Group mentoring
- This guide focuses on one-on-one meetings and provides tips on how to get the most from your arrangement.
- The best mentoring relationships are those that develop naturally and acquire their own energy. A good mentor will be responsible for providing support and counsel regarding both professional and personal issues. The mentor also gives open and honest feedback on any issue and is a trusted sounding board.
- How you choose to play the role of mentor will be determined by your own personal style and the dynamics of the relationship.
- Think of the goals you want to achieve in your role as a mentor: grow and expand leadership skills, enhances skills in coaching, listening, renews enthusiasm for the role of expert, share your knowledge, establish a reputation as a mentor or advisor, support younger members in their career goals.



## Key Steps

The following is an outline of steps to take to initiate the mentoring program and to sustain it from beginning to end:

Creating the mentor/mentee pairing will be based on compatibility from application forms.

The mentor may then conduct an orientation session and introductions are made to get to know one another.

Both the mentor/mentee may then conduct planned activities, discuss how often to meet, how to meet and monitor action plans.

- At a stated point in time of the program, we ask all mentees and mentors to complete the mid-point evaluation form. This is a great opportunity to ask for or receive feedback on the program or procedures to ensure this is a positive experience for both parties.
- Upon completion of the term of the mentoring relationship, it is time of reflection and celebration. This is an opportunity to explore how to set a course for ongoing learning and development beyond the mentoring experience and to mark the completion of the mentoring program.

At conclusion, there will be a survey to conduct an overall program evaluation with the mentors and mentees. Feedback is important to measure the success of the mentoring program. A survey will be provided for the mentors and mentees to fill out so that the program can be evaluated and continue making improvements.

The following forms will be available for both the mentor and mentee to use for the application and tools throughout the program:

- Application forms
- Confidentiality form
- Individual Action Plan/Objective Form
- Midpoint Evaluation Form
- Mentoring Final Review Form
- Mentee Final Review Form



## How Does the Connection Occur?

The mentoring program is designed to be overseen by the AFWA program chair.

Both mentor and mentee must apply to participate in the mentoring program by contacting the program chair.

- The AFWA Mentorship Program connects members seeking guidance in their careers with AFWA members with real world experience and the desire to share their learnings in a mentoring relationship. Members benefit from this support and guidance as they prepare for their careers and professional lives.

A productive mentoring relationship depends on a good match.

- A list of Mentors' profiles will be provided to the mentee to review by the program chair. The mentee lists the top three mentors they wish to meet. The mentee's preference might be level of experience, same industry, or hobbies.
- The program chair will notify the mentor with the name, contact information and BIO of the mentee. (connections will be made once a month and the mentor/mentee will be notified following)
- The mentor then contacts the mentee to briefly introduce themselves and set a time to meet to learn more about each other and outline objectives.

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# *Roles and Responsibilities*

## *Role as a Mentor*

A mentor motivates his or her mentee to do their best and make decisions that will further themselves personally and, in their careers, ask thought provoking, open-ended questions, assist in developing short and long-term goals.

It can be very easy to jump in and solve your mentee's problems. However, help your mentee think for themselves, help your mentee self-discover.

- A mentor should have the:
  - Desire to help mentee maintain goals
  - Create a supportive and trusting environment
  - Active listening skills
  - Credibility, seniority in relation to the mentee
  - Demonstrates expertise and shares knowledge
  - Serve as a positive role model
  - Respect your mentee's time
  - Establish boundaries and maintain professional behavior
  
- A mentor should provide:
  - Trust and confidentiality
  - Vision, insight and encouragement
  - Constructive feedback
  - Regular meetings
  - Follow through on tasks in preparation for the next meeting



# ***Roles and Responsibilities***

## ***Role as a Mentee***

- Show interest in what your mentor has to offer by avoiding other distractions during meetings, express appreciation.
- Be on time for all your meetings and respond timely to phone calls or emails.
- Follow up timely on all assigned tasks or communicate to discuss a new plan.
- If you are talking by phone, reduce any background noise and limit interruptions.
- Be open to learning and ask appropriate questions to clarify what your mentor is teaching you.
- Apply the information and report back on how that is working for you. Go beyond what your mentor suggests and show creative ways of using those suggestions.
- Keep your conversations confidential.



# *Making the Connection*

- **First Meeting**
  - Explain the purpose of the first meeting
  
- **Introduction**
  - Get to Know One Another
  - Discuss what you each want out of the relationship
  - Offer suggestions for opening questions
  
- **Setting Guidelines**
  - Discuss the format of meetings i.e.: how structured do you both want the meetings?
  - Discuss what preparation will be needed to prepare for each meeting
  
- **Schedule**
  - Discuss when meetings will take place: Set a schedule for your meetings.
  - Provide an Action Plan Form to fill out together during the initial meeting.





## *Mentor Tips & Mentor's Script for First Meeting*

- **Prior to first meeting, the mentor should:**
  - Obtain and review the mentee's bio
  - Make sure your calendar is free and to ensure you will not be interrupted
  - Draft mentoring goals
  
- **During the first meeting**
  - Let the mentee guide the discussion's flow and articulate her goals and objectives.
  - Introduce yourself and your background
  - Ask about mentee's background and interests
  - Open the table for any general questions or thoughts
  - Decide how, when, where and length of time you're both going to meet- i.e.: informal, formal, short term or long relationship
  - Are there any concerns the mentee might have about mentoring?
  
- **At the end of each meeting**
  - Ask mentee to summarize what was discussed:
  - What was most important, what is she looking forward to in the relationship
  - Decide on the mentee's action items and timetable
  - Reminder her to send you an email summarizing the meeting within a week including action items for both mentor and mentee
  - Set time for next meeting

***Most of all, mentoring is powerful and remember to  
HAVE FUN!***



## ***Mentee Tips & Preparing for the first meeting***

As you introduce yourself, you may want to share some of your personal life and career goals to get acquainted as this may assist the mentor on how to structure your meetings to meet your goals.

- How do you spend your time if you had a free day?
- What do you do for fun?
- What keeps you awake at night?
- What do you do to de-stress?
- How do you balance your work, family time and time for yourself?
- You may be asked why you want a mentor- List the benefits you hope to gain.
- Reflect on your plans for your career and personal goals and what you would like to accomplish with the mentoring program.
- Be specific about your goals rather than a general goal, i.e. “Learn how to network” might be a general goal, whereas “Connect with an attendee at a specific business group” might be a more specific goal. Think “SMART” goals.
- Be open to learning from your mentor as your goals might change and discuss this with your mentor.

Suggested invitations with your mentor:

- Invite your mentor to your campus events or your chapter meetings.
- Arrange to meet in person at the AFWA Leadership or National conferences.



## Action Plan

A form is made available for both the mentor and mentee to use during the meetings. This is a guide to memorialize the meeting times, goals, measure progress towards attaining each goal you set and is to be completed together during your meetings. Factors to consider when developing your action plan:

- How long do you wish the mentoring program to be? Suggestion: 9 or 12 months?
- How often would you like to meet?
- Consider your location and time zone to best determine meeting times.
- What is the best meeting structure: is it by phone, virtual meetings?
- Consider the technology you each must have to hold these meetings and consider alternative methods should there be technological inconveniences.
- What is the best way to reach each other?
- Be creative during your meetings, you may have a relevant Podcast that you can both listen to together, watch a video and discuss the topic afterwards.
- Or suggest an article to read before the next meeting and discuss it.
- If you both are within the same proximity, consider doing an outdoor activity i.e. hiking, going for a walk, Paint & Sip group activity.

Remember: Make it FUN!

This form does not need to be submitted to the Program Chair but used during the mentoring sessions.

The mentor and mentee should maintain records of activities and career growth during each session. Use these records to reflect on the successes or changes in strategy on adapting to certain roadblocks.

## *Mentor's Guidelines for Closure*



This is the time to celebrate the journey you and your mentee have been on this past year. Some best practices are to have a conversation with your mentee, to ensure that closure in the mentoring relationship promotes growth.

Mentors can reflect on their experience with their mentees and share positive feedback and words of encouragement.

- What were some of the conversations you remember?
- What did you learn that you can apply to your future?
- What excited you or what did you gain with our time together?
- What did you find frustrating?
- How would you summarize your accomplishments?
- Would you want to continue your relationship and touch base in future months and check in with each other?
- Would you like to become a mentor and share your successes?

It is recommended that you give a gift to your mentee.

### Gift Ideas

- A meaningful token or souvenir related to the purpose of the mentoring relationship and should be kept to a minimum and be modest in cost. This might include:
  - Inspirational and motivational books
  - Blank journals in preparation for the next mentoring journal
  - Thank the mentee for the experience and learning opportunity

### **Closing:**

This has been a very helpful reflection on our time together. I've gained some new insights into my life as well as what it means to be a mentor and had



the opportunity to get to know a very intelligent, lovely person. Good luck with all that you will do.

***Thank you*** for your interest in the Accounting and Financial Women's Alliance Mentor Mentee Program. If you should have any questions, please contact us.



AFWA National  
2365 Harrodsburg Rd., Suite A325  
Lexington, KY 40504  
[afwanational@afwa.org](mailto:afwanational@afwa.org)  
859.219.3532



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