



Emerging Bank Leaders Mentor Match Program Guidelines

EMERGING BANK LEADERS MENTOR MATCH: A NEW MEMBER BENEFIT PROGRAM OVERVIEW

Who can participate?

Any Emerging Bank Leader member may participate in Mentor Match.

What is Mentor Match?

An online directory facilitating a match between two bankers, a mentor and a mentee, who will follow a three-month program, working together to help mentees set and meet their goals.

When can I sign up and get matched?

Mentor Match sessions run three times per year (January-March, May-July and September-November). Matching does not happen automatically – mentees should find and request a mentor through the online directory. (UBA staff can help match people, upon request.)

Where does the mentoring take place?

Anywhere! It's up to the participants. You may meet entirely virtually, if you wish.

How should I use this document?

This program overview is meant to be used as a guide. You don't have to follow it exactly, unless you want to.

Minimum Recommendations:

- ◆ Once matched, mentees should complete the goal-setting worksheet.
- ◆ Mentors and mentees should review the "Guidelines" documents to better understand their roles.
- ◆ Schedule an Discovery Call with your mentoring partner as soon as possible.
- ◆ Communicate at least monthly during the three month period.
- ◆ Schedule a wrap-up meeting during Month 3.
- ◆ Complete the evaluation survey and submit to UBA.
- ◆ Expect to spend a total of approximately 5 hours over the course of the program communicating and carrying out action plans.

Note: Doing more than the minimum is certainly encouraged! You and your mentoring partner may decide to meet more often than monthly, or to get together in person (if possible) in addition to communicating virtually, connecting via social media, etc.

UBA Statement on Collusion:

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Suggested Structure

We recommend structuring your time together in the following way. You may use this as a guide and follow it as you see fit.

Discovery Call: Get to Know Each Other

Build your relationship and garner trust by sharing some personal information. Topics may include:

- ◆ Your background and how it has shaped you
- ◆ Your career overview or your experience in school
- ◆ Your strengths and shortcomings
- ◆ What you enjoy doing, both professionally and in your free time
- ◆ Your challenges, or what you worry about most
- ◆ Your hopes for the future
- ◆ What is most important to you in your life and career

Also, decide how you will communicate with each other during the course of your mentoring relationship. Consider the following:

- ◆ Do you have a preference for phone calls, Skype, email, or other kinds of communication?
- ◆ If you live close enough to each other or are attending any upcoming UBA conferences, would you want to meet face-to-face? (It is okay to answer no.)
- ◆ How frequently do you expect to communicate?
- ◆ How much time do you have to spend, both communicating with your partner and on the tasks you set? (It is a good idea to set your goals accordingly.)
- ◆ Are there times during the next three months when you will be unreachable due to travel, personal plans, or work commitments?

Month 1:

Discuss and Set Goals and Metrics for Your Mentoring Relationship

Mentees should complete the goal-setting worksheet to share with their mentors. Use this as a starting point to discuss what you intend to work on during the program.

- ◆ Prioritize the areas of improvement you want to work on together
- ◆ List your specific concerns in those areas
- ◆ Translate those concerns into goals
- ◆ Assign a deadline for each goal
- ◆ Decide how you will know whether you have succeeded in reaching your goal(s)

Develop an Action Plan

Now that you know what you and your mentoring partner are conjointly working toward, develop a plan to take action toward those goals.

- ◆ List the tasks you will need to complete to reach your goal
- ◆ Decide who will do each task
- ◆ Assign a deadline for each task
- ◆ As you go, check to make sure that your tasks truly align with your goals

Months 2 and 3: Take Action

Now that you know what you want to do, and how you're going to do it, it's time to put your plans into action.

- ◆ Complete the tasks you have identified
- ◆ Ask questions
- ◆ Ask for feedback
- ◆ If something isn't working, adjust your plan
- ◆ Schedule a wrap-up meeting with your mentoring partner

Conclusion

Review what you have worked on together during your mentorship period.

Ask Yourself:

- ◆ Did I reach my goal?
- ◆ Did I enjoy and learn something from the experience?
- ◆ Did I change direction as a result of the experience? Did it help me make a tough decision, or feel more confident in my plans?
- ◆ Did I acknowledge and celebrate progress?

Finally, whether you are a mentor or a mentee, complete your evaluation survey. This will help us to improve Mentor Match in the future.

CONGRATULATIONS – YOU'VE COMPLETED THE PROGRAM!

Final Thoughts

Thank your mentor or mentee for their time. Consider maintaining your active status in the Mentor Match program, so that you can be matched again.

If you and your mentor/mentee mutually would like to continue working together beyond three months, you may certainly do so. Just have the mentee request the mentor again, and once the mentor accepts, you are matched in the system for the next session.

You may also want to continue your relationship on an informal basis, outside of Mentor Match. That's great

– have fun and tell us about your success!

EBL MENTOR MATCH: GUIDELINES FOR MENTORS

Thank you for getting involved in UBA's Emerging Bank Leaders Mentor Match program! Mentoring is a specialized form of teaching. It takes practical knowledge, but also willingness to share some of your time, personal experiences, and judgment.

Although it is the mentee who should take the initiative in the mentoring relationship, it's important for mentors to co-create it as an active participant. Here are some guidelines that can help.

Identify Your Motivations (Ask yourself...):

- ◆ Why do I want to be a mentor?
- ◆ What do I hope to get out of this experience?
- ◆ What do I have to share? (Skills, expertise, experiences, advice)

Communicate Expectations

Stay somewhat flexible, but let your mentee know the following:

- ◆ How much time you are able to devote to mentoring
- ◆ What you're willing to discuss and anything you are not willing to discuss
- ◆ Your communication preferences and general availability
- ◆ Your expectations of him or her

Work Together

Your mentee is expected to take the lead in contacting you, organizing calls or meetings, and setting goals and objectives for your time together. But you should take the lead in facilitating the discussion.

Your role is to:

- ◆ Answer questions openly and honestly
- ◆ Ask questions for clarification or deeper understanding
- ◆ Give examples
- ◆ Suggest action based on your mentee's goals
- ◆ Offer constructive feedback
- ◆ Be encouraging – recognize that your mentee is less experienced than you
- ◆ Be responsive – strive to communicate back to your mentee quickly and thoroughly

Things to Remember!

- ◆ Get to know your mentee by offering some personal information about your life, career, strengths, and challenges. Being open and friendly helps make it easy for them to share information with you, too.
- ◆ Take direction from your mentee's goals. For example, if he or she is struggling with a decision regarding their career your job is to provide perspective on their situation rather than tell them what to do.
- ◆ Make sure to tell your mentee that you're interested in his or her success. It is a simple statement that helps build trust..
- ◆ Under no circumstances should a mentor offer a mentee a job or discuss specific compensation or salary information.

EBL MENTOR MATCH: GUIDELINES FOR MENTEES

Many mentors want to give back to their profession, help others, and share their knowledge, among other possibilities.

As a mentee, you may hope to gain something of more practical value, such as advice on particular career questions, strategies on how to build your network, or insight into the realities and culture of your chosen field, just to name a few.

Hopefully, both you and your mentor will benefit from the relationship. But, because you stand to gain more tangible benefits, it is your role, as a mentee, to be proactive. Success depends on the actions you take!

Here are some guidelines that can help.

Identify Your Motivations (Ask yourself...):

- ◆ Why do I want to be mentored?
- ◆ What do I hope to get out of this experience?

Requesting a Mentor

You may be nervous about asking someone to be your mentor. That's normal. Keep in mind – they already signed up for this program! If they weren't willing to be asked, they would not have volunteered. Most people are happy and flattered to be asked for help. After you send the official request to your mentor, it's recommended that you follow up with a brief personal message. Just three sentences are all you need:

- ◆ One sentence summarizing why you're seeking a mentor
- ◆ One sentence about what drew you to their profile (such as what interests you have in common)
- ◆ One sentence expressing hope that they will consider working with you and thanking them for their time

Communicate Expectations

Once your mentor has been confirmed, you should discuss the details of how you would like to work together. Be open to their ideas – and especially to any time constraints they may have – but also be open with them about what you want. Let your mentor know:

- ◆ Your goals for the mentoring experience
- ◆ What you would like to learn from him or her, what you need advice on, etc.
- ◆ Your communication preferences and general availability

Work Together

You must take the lead, and also do the work to achieve your goal. Your mentor is there to guide you, answer questions, suggest action, and encourage you.

- ◆ Contact your mentor to introduce yourself.
- ◆ Be the one to organize any phone calls or meetings.
- ◆ Ask for what you want, as long as it is reasonable and realistic.
- ◆ Be open and receptive to feedback.

Ask questions if you don't understand something your mentor says. There are no stupid questions! If you agree to take a certain action, follow through. Report back to your mentor on what did or didn't work.

If you don't agree with a suggested course of action, say so honestly and discuss alternatives. If you feel you're being misunderstood, speak up and clarify your goals.

Things to Remember!

- ◆ Your mentor is your advisor, guide, and resource, but not your parent or boss.
- ◆ Understand that your mentor cannot make decisions for you.
- ◆ Be appreciative of the time your mentor is spending to help you. A written thank-you letter at the end of your mentoring period is a great idea and simple to do.
- ◆ One of the best ways to thank your mentor is by following up later. Have you implemented an idea that you discussed with your mentor? Was it a success? Let your mentor know that something they told you made a difference.
- ◆ Consider becoming a mentor yourself – now or sometime in the future. You don't have to be a high-level professional with decades of experience to share your knowledge. Think about ways you can help others and get involved.
- ◆ Under no circumstance should you ask your mentor for a job or discuss specific compensation or salary information.
- ◆ Please be sure to read the statement on collusion provided on page 1 of this guide.

EMERGING BANK LEADERS MENTOR MATCH: Initial Discovery Call Guidelines

- ◆ This is a “getting to know each other” call and that at the end of the call each can determine whether to proceed or not.
- ◆ Inquire about Mentee story and what led them to consider this program. Briefly review the Mentee Worksheet and discuss what they are looking for as success as a result of three months working together.
- ◆ Outline mentor’s background. Explain what mentoring will look like – will the mentor just respond to questions? Ask questions of their own? Proactively provide resources? Or wait to be asked?
- ◆ Discuss confidentiality and security.
- ◆ Review and agree upon roles of both the mentor and the mentee from the Mentor Match Overview document.
- ◆ Discuss how the mentee wants to be mentored. Discuss boundaries & preferred communication styles.
- ◆ Grant the relationship power. It is not the mentor’s experience that will help the mentee; it is being in the relationship that will move the mentee forward. Grant the relationship power by being fully forthright, open, and honest. Grant the relationship power by making it a safe container, without judgment and by challenging the mentee to be more than they think they can be.
- ◆ Confirm the need to set up firm dates and times for the three mentoring calls. Note the impact of vacations, late or missed calls, and other changes in scheduling that may arise. Set expectations on both sides in regards to cancelled or missed calls.
- ◆ Review the UBA Statement on Collusion below.
- ◆ Talk about the issue of commitment, discuss being human, and explain while that learning and change may take time, the foremost intent of this Mentoring program is to move the Mentee forward towards their objectives and goals.
- ◆ Inquire on mutual agreement to continue with full three month Mentoring Program.
- ◆ If agreed, share contact information and establish the date, time, format and goals for the first call.

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EBL MENTOR MATCH: GOAL SETTING WORKSHEET

Start by thinking about different areas of improvement you would like to work on with your mentor. Prioritize them on a scale from 1 to 3 (1 - most important, 2 - medium importance, 3 - not important right now).

List your specific concerns in this area.

<p>Being a Good Leader/Manager</p> <p>Priority:</p> <p>Concerns:</p>	<p>Building Relationships/Networking</p> <p>Priority:</p> <p>Concerns:</p>	<p>Creating Work/Life Balance</p> <p>Priority:</p> <p>Concerns:</p>
<p>Developing My Career</p> <p>Priority:</p> <p>Concerns:</p>	<p>Changing Jobs or Career Paths</p> <p>Priority:</p> <p>Concerns:</p>	<p>Working Successfully in Banking</p> <p>Priority:</p> <p>Concerns:</p>
<p>Learning More About My Interest Areas</p> <p>Priority:</p> <p>Concerns:</p>	<p>Improving My Technical Skills</p> <p>Priority:</p> <p>Concerns:</p>	<p>Understanding the Culture of Banking</p> <p>Priority:</p> <p>Concerns:</p>

<p>Preparing for Promotion</p> <p>Priority:</p> <p>Concerns:</p>	<p>Furthering My Education</p> <p>Priority:</p> <p>Concerns:</p>	<p>Dealing with Difficult People</p> <p>Priority:</p> <p>Concerns:</p>
<p>Managing Change</p> <p>Priority:</p> <p>Concerns:</p>	<p>A Recent Promotion</p> <p>Priority:</p> <p>Concerns:</p>	<p>Other:</p> <p>Priority:</p> <p>Concerns:</p>
<p>Other:</p> <p>Priority:</p> <p>Concerns:</p>	<p>Other:</p> <p>Priority:</p> <p>Concerns:</p>	<p>Other:</p> <p>Priority:</p> <p>Concerns:</p>

Next, look at the areas you marked as MOST IMPORTANT and the concerns you listed in those areas. Translate those concerns into goals, remembering that goals should be SMART:

- ◆ **SPECIFIC** – Is this goal narrow enough?
- ◆ **MEASURABLE** – How will I be able to tell whether I’ve achieved this goal?
- ◆ **ATTAINABLE** – Can I create an action plan that leads me to achieving this goal?
- ◆ **REALISTIC** – Is it reasonable to expect that I will achieve this goal?
- ◆ **TIMELY** – Can I achieve it by my deadline?

Use this area to define your goals, commit to a deadline, and note what you have achieved throughout the program.

GOALS	DEADLINE	DEFINE SUCCESS
1.		
2.		
3.		
4.		
5.		

EMERGING BANK LEADERS MENTOR MATCH: Ending the Mentoring Relationship—Mentors

As you conclude your support as a mentor, your mentee will appreciate if you reflect back on progress and changes since the beginning of the conversation. By noticing and drawing attention to the mentee's progress, you will provide encouragement that is likely to motivate more growth and action on the part of the mentee. Acknowledge challenges and obstacles that the mentee faced during your time together. Your recognition of the mentee's efforts will help the mentee to see his or her efficacy and capability in a new light. Many people find it helpful to end a mentoring relationship with a sense of purpose and direction for the future. We encourage you to use the last session to focus on future goals and the support systems that the mentee will put in place to support continued development. In summary, you can conclude your responsibilities as a mentor in a positive and productive manner by:

- Being clear about how you would like to relationship to work after the formal mentoring is completed.
- Acknowledging specific areas of progress and growth that you have observed in the mentee during the mentoring period.
- Giving verbal recognition of challenges that your mentee has faced and/or overcome.
- Helping your mentee set goals for the future.
- Asking your mentee to identify the support system and resources that will support achievement of those goals in the future.
- Encouraging your mentee to continue on the journey of his life as a lifelong learner.

EMERGING BANK LEADERS MENTOR MATCH: Ending the Mentoring Relationship—Mentees

Remember that ending the formal mentor relationship may not mean ending the relationship. Many mentors and mentees continue to stay in touch informally and support each other in a variety of ways over time. Here is an approach that may help you plan your final mentoring session:

- Begin with a simple, clear statement about how you see your career and the mentor relationship at this time. Express gratitude to the mentor for his or her time and contribution to your progress. For example, “I’ve come a long way during the past several months. I am grateful for your guidance and support.”
- Let your mentor know how the mentorship has benefited you. “Thanks to you, I have a much better understanding of how to navigate my career. You’ve helped me to feel more confident as a banker/lender/professional/leader. I really appreciate your insights and support.”
- Ask for the relationship to continue informally if you would like to maintain the relationship. “Would you be willing to hear from me now and then in the future?”
- Offer your support to the mentor. “I would love to support you in some way in the future. Please don’t hesitate to contact me if I can ever be of assistance.”
- Suggest a focus for the final session. You might like to celebrate all that has been accomplished and have a more informal session. You could also ask for help in identifying “next steps” for your career.
- Write a personal thank you note and mail it to your mentor within two days after your last session

