

# AFP Golden Gate/Northern California Planned Giving Council 2021 Mentor Program Guidelines

## MENTORS & FELLOWS

- Complete a Working Agreement
  - Explicitly discuss with the Fellow their goals and expectations.
  - Set tangible outcomes or projects so you both will know if you are meeting those goals. Keep in mind needs may change over time.
  - Commit to meeting a minimum of once per month either in-person or virtual platform, and schedule and set expectations about how often you will communicate additionally via other channels.
- Set boundaries for your relationship.
  - Agree to set aside a few minutes of each meeting for “checking in” but do not get distracted by too much “venting.” Set limits on unconstructive conversations.
  - Commit to confidentiality, on both sides.

## MENTORS

- Be conscientious about your commitment to your Fellow. Honor this relationship and make time for it. Honor the level of responsiveness agreed to.
- Commit to making the Fellow aware of available resources from AFP/NCPGC, other professional resources and be willing to refer her/him to someone else for additional help/information.
- Help the Fellow in establishing successful professional connections as requested.
- Encourage participation in educational/career development/skill building seminars, training, programs, etc. as appropriate.
- Provide constructive feedback on the Fellow’s actions and goals.
- Encourage creativity and independence.
- Be a champion for your Fellow!

## FELLOWS

- Spend time thinking through your goals and expectations for this program. Decide what you would like to accomplish and work with your Mentor to see how they can specifically help you.
- Structure a plan with your Mentor so that no time is wasted “venting” about frustrations in your job or with your supervisor. A concrete plan of action can improve your situation, skills, etc.
- Pledge to keep your commitment to your Mentor and this program. Honor this relationship and make time for it. This is an opportunity to add to your professional outlook, skills and network.
- Do the work or projects that you have agreed to in your contract. This is about YOU and it’s up to you to make it work. Nothing ventured, nothing gained!
- Be open to constructive feedback on your actions and goals.
- Have Fun!

## Sample Working Agreement

Note: Each fellow's needs will vary dramatically. Please develop your own goals and agreements based on your professional needs. At the outset, it will be useful to have a conversation about both the fellow and mentor's expectations for the relationship and goals, though these may evolve over time. Please fully review the program guidelines before the program and honor them in order to foster a constructive and fulfilling relationship. You aren't held liable to keep to a strict adherence to your agreement, but ought to keep to it to the best of your ability out of respect for one another's time and commitment. Like any relationship, the more you put into your mentor relationship, the more you will get out of it.

### Fellow Goals

Grow knowledge of and implement best practices for managing a major gifts portfolio

- Outcome 1: discuss ideas on how to approach disengaged former donors in portfolio and implement 3 new ideas
- Outcome 2: discuss ideas on increasing engagement for current donors and implement 3 new ideas
- Outcome 3: discuss best practices for maintaining donor communications schedule and develop improved communications calendar
- Increase comfort with discussing your advancement, and toward asking for a promotion
- Outcome 1: talk through roles, responsibilities, and achievements with mentor, to identify areas to grow and areas to focus on when discussing a promotion with my manager
- Outcome 2: identify areas to improve upon and grow in, and track progress with mentor
- Outcome 3: talk through how to start the conversation of requesting a promotion with my mentor and practice with mentor, then have the conversation with my manager
- Increase familiarity with planned giving programs and learn best practices to implement at my organization
- Outcome 1: learn about what other organizations do for their planned giving programs
- Outcome 2: identify two ideas to implement to improve my organization's program
- Outcome 3: learn about ethical considerations for planned giving programs

### Mentor Goals

- Assist my fellow in achieving their goals to the best of my ability
- Share helpful development resources with my fellow
- I will be available by phone or email should my fellow need assistance between our regularly scheduled meetings.

### Meeting Expectations Example

- We will meet on the first Tuesday of every month for one hour at 6pm at a mutually convenient location or online platform. Should either of us be unable to make the meeting, we will notify the other as soon as possible and be held responsible to reschedule.
- We will reserve the first 5-10 minutes of meetings for catching up, then we will have a more focused conversation, led by the fellow, related to progress on the fellow goals or other professional needs as they arise.