****

**Mentoring Program**

2022-2023

Overview and Program Guide



**UACPA Mentor Program Mission**

The UACPA Mentoring Program is an opportunity for experienced professionals to help students develop their goals and skills. The program is a result of the Emerging Professionals Council member’s interest to connect and provide support and guidance to students and aspiring CPAs. Special thanks to other CPA state societies and schools who provided examples of successful programs.

**Mentoring Is…**

* Critical to developing and nurturing careers.
* Founded on mutual respect, trust, understanding, and empathy.
* Focused on the needs of the mentee, helping them develop a vision for the future.
* Empowered by authenticity – being honest, open, and direct with each other.
* A two-way professional relationship over a specified length of time (Sept-May).

**A Great Mentor…**

* Relates to the mentee without biases getting in the way.
* Takes a focused interest in helping student and recent graduates develop their career.
* Listens both to what is said and to how it is being said.
* Acts as an impartial sounding board for questions received and asks thought-provoking questions in return.
* Helps the mentee solve a problem, rather than giving direction.
* Focuses on the mentee’s individual development without attempts to produce a clone.
* Acts as a mirror to show the mentee who they are and what they can become.
* Helps the mentee feel comfortable in their own skin and appreciate their own talents.

**A Successful Mentee…**

* Takes full advantage of opportunities to learn.
* Is introspective and honest with themselves.
* Drives the mentoring relationship by reaching out to schedule meeting dates.
* Creates personal goals, and proactively identifies actions to successfully complete these goals before asking the mentor for guidance.
* Recognizes that different perspectives are helpful (even imperative) to deciding on the right path.
* Is open to constructive criticism and feedback.
* Shares their honest thoughts and feelings, despite discomfort.
* Brings up topics important to them.

**Program Guidelines and Expectations**

**Meeting Frequency & Location**

After evaluating availability and schedules, please ensure that you meet at least once per quarter, for at least one hour per meeting. Face-to-face or video-chat meetings are encouraged where possible, however, we do understand that coordination may require some meetings to occur over the phone.

In-person meetings should take place in a professional, public setting or virtual exchange – not, for example, in the home of a mentor or mentee.

Each pair should discuss and agree upon the amount of communication that will occur between formal meetings (“call me anytime” vs “let’s discuss things only during our scheduled meetings”).

Meetings should occur only during the specified period beginning in September and concluding in May of the following year.

**Meeting Agendas**

The formality and structure of meetings should be determined based on the participants’ preferences, but for the initial meeting we suggest beginning with the following:

1. Both parties share their backgrounds and what they hope to gain from the relationship.
2. Mentee shares 2-3 goals/objectives that will guide discussion topics for future meetings (mentee should contemplate and identify these before the meeting begins).
3. Use remainder of time to get acquainted with one another, focusing on establishing trust.
4. End the meeting by recapping key discussion points - Solidify 2-3 goals/objectives that will becoming the backbone of future meetings.
5. Agree on planning for future discussions (acceptable forms of communication, whether contact between meeting is acceptable or not, date and time of next meeting… etc.).

**Helpful Tips for Mentors**

1. Ask yourself: What is motivating you to be a mentor despite your busy schedule? Identify your needs, expectations, and limits for this relationship.
2. Analyze what you have to offer a mentee. Be brutally honest with yourself as you consider what influence, skills, knowledge, and other contributions you can make. Don’t forget to acknowledge your weaknesses and being forthcoming about your mistakes.
3. Look after your mentee’s needs but consider your own as well. Be certain about what you want from the relationship and what you are willing to give.
4. Understand the differences between passive and active listening:
	1. PASSIVE listening: when a listener does not verbally respond to the speaker. The listener may send non-verbal messages through eye contact, smiles, yawns, nods, and time-checks. This type of listening is appropriate when:
		1. The speaker wants to gripe, vent frustration, or express an opinion
		2. The listener wants to take mental break or be entertained while the speaker relays a story
	2. ACTIVE listening involves verbal feedback, through questioning or asking for additional information. Another form of active listening is repeating and paraphrasing to ensure proper understanding (e.g., “let me make sure I’m with you so far…” or “what I think I hear you saying is…”). This type of listening is appropriate to ensure that you have understood the speaker’s facts, concerns, and observations. Active listening should always be conducted before providing feedback, advice, or guidance.
5. Be prepared for the relationship to change or end after the Mentoring Program concludes. A successful mentor-mentee cycle requires that the mentee move on and the relationship either ends or takes a different form.

**Helpful Tips for Mentees**

1. Ask yourself: What is motivating you to be a mentee despite your busy schedule? Identify your needs, expectations, and limits for this relationship.
2. Identify your fears and what has been holding you back when pursuing and achieving the level of success you desire. What parts of the fears do you need to face? How will you comfortably address those hesitations when they come up in your conversations with your mentor?
3. Respect your mentor. Even if his or her background is not perfectly aligned with yours, the experience of sharing your thoughts with him or her is bound to expose you to a different way of viewing your situation.
4. Understand that a mentor is different from a counselor or psychiatrist. Keep conversations focused on your professional goal and limit the personal facts that you share to those that directly impact your career and those that influence you as an individual
5. Be prepared for the relationship to change or end after the Mentoring Program concludes. A successful mentor-mentee cycle requires that the mentee move on and the relationship either ends or takes a different form.

**Program Feedback**

Participants will be asked for feedback upon completion of the program via an email containing a link to an online survey. These emails will be sent out to each individual separately, and responses will not be shared with program participants. Everyone’s willingness to complete the survey is greatly appreciated and will benefit the program’s strength and integrity in future years!

**UACPA Contact Person for Questions**

If you have any questions or need advice during the program, please contact:

Susan Speirs, CPA

801-834-6635

ss@uacpa.org

**Program Conclusion**

After May of 2023, the Mentoring Program will formally conclude with a group gathering where participants will be able to reconnect and share experiences. Details about this event will be communicated to participants in early 2023.

**Mentoring Program Application**

TO BE ADDED ONLINE VIA WEBSITE/SURVEYMONKEY

To Include:

Agreement and acknowledgement

By submitting this application, I understand that I am expressing my commitment to fully participate in the program if selected, and that I will be matched with a mentor/mentee based on the information provided above. I agree to full participation and will comply with all program rules, restrictions, and requirements.

I understand that this is a professional program and I agree to conduct myself in a professional manner during all interactions with my mentor/mentee. I agree to make reasonable effort to initiate and maintain contact with my mentor throughout the course of the program. I agree that, if I am unable to meet with my mentor during a scheduled time or need to cancel a meeting, I will notify him/her as soon as possible. I understand that I bear equal responsibility with my mentor for ensuring that we interact as frequently as is required by the program guidelines.