This handbook has been created to provide guidelines and expectations for both the mentor and mentee. Please review this handbook so that you are aware of the commitment involved before applying for the program.

For general inquiries regarding the mentoring program, please email:

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Julia Kao – Julia.Kao@commerzbank.com or
Nikita Airen – nikita.airen@citi.com
Mission Statement
Guiding Star, a mentorship program for WBC scholarship winners, is part of the overall mission to provide education, mentoring and networking opportunities to young women who have been awarded with the WBC scholarship. This program is aimed at benefiting both the mentor and mentee by fostering a safe and supportive environment where participants can question and reflect upon their education and professional choices as they relate to developing a career.
1. **Program Guidelines and Principles**

- **Background.** It is a proven fact that receiving effective mentoring is one of the keys to a successful career. As such, the WBC Mentoring program is a mandatory feature of the WBC Scholarship and participation is required for all Scholarship Winners. The program is structured to help both the Mentor and Mentee by fostering a safe and supportive environment where participants can question and reflect upon their education and professional choices as they relate to developing a career. The WBC Scholarship Policy provides details of criteria and requirements for participation for Mentees.

- **Given the importance of these relationships and process, the WBC Mentoring program mandates, as also noted in the WBC Scholarship Policy, that a mentee may be suspended or removed from the mentorship program if she is; (i) suspended or expelled from school; or (ii) found in violation of her university’s honor code. Additionally, either mentor or mentee may be suspended or removed from the mentorship program if they are convicted of a felony, or of a misdemeanor involving fraud or moral turpitude.

- **Duration.** This program is in effect throughout the year, beginning when the Mentee is paired with the Mentor at the Scholarship Awards Ceremony and continuing throughout the Mentee’s college career.

- **Commitment and Goal Setting.** The relationship begins with the goal setting process - created by the Mentee with help from the Mentor, and continues to be used as a guide throughout the program. The Mentor plays a significant role in helping the Mentee strategize on how best to go forth and achieve those goals. While the Mentor guides the Mentee through the school year, success is determined by the energy, focus, and thought that the Mentee brings to the process. The goals should be reviewed monthly to make sure both the Mentor and Mentee are on track with reaching them.

- **Meetings.** Mentors and Mentee are expected to meet at least once a month for a minimum duration of an hour. These meetings can be in person or on the phone. Each participant will be asked to join / respond to a Semi-annual touch-point call / email questionnaire led by a member of the Women’s Bond Club Mentoring Committee. Additional check-ins will be conducted on an as required basis. The Mentoring Committee member will also review the progress of both the Mentor/Mentee to better gauge effectiveness of the process and relationship. All information is shared only on an as needed basis with other WBC Committee members. Mentors and Mentees will be subject to re-matching based on the quarterly feedback process or a specific request.

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1 – See Section 5 for guidelines on mentor / mentee meetings
2. **Mentor Policies**

All participants in the WBC Mentoring program must adhere to the policies as described herein. Any questions regarding such policies should be referred to the WBC Mentoring Committee for initial consideration and the WBC Board for final decision.

- A mentor must be a WBC member (corporate or individual membership) professional.
- A mentor must submit to a background check and regular updates.
- A mentor must advise the WBC Mentoring Committee if they change employment, provide updated contact details (where necessary), and agree to obtain a new membership where necessary within 30 days.
- A mentor must be able to commit at least the minimum amount of time that complies with Mentoring Program requirements and what is indicated on their WBC Mentoring Application.
- Drinking in front of, or providing alcohol to your Mentee, is strictly prohibited except in the context of a WBC sanctioned event where alcohol is served and the Mentee is of legal drinking age.
- A mentor may be suspended or removed from the mentorship program if they are convicted of a felony, or of a misdemeanor involving fraud or moral turpitude.

3. **Mentor Guidelines**

Mentors should use the Guidelines below to direct and provide context to their relationship with their mentee.

- The mentor will share insight and provide guidance, wisdom and support to help her mentee establish and reach educational and professional goals.
- She can serve as a teacher, sponsor, coach, confidante, devil’s advocate and role model. With this definition in mind, the following guidelines may be helpful:

- Be honest about what you have to offer in terms of time. If you have ten minutes available for a telephone conversation, state this time factor in the beginning of the call and then firmly stick to it after ten minutes have passed. Similarly, if satisfying the required once-a-month, in-person meeting with your Mentee is the maximum time you can give to the relationship, simply be clear about this commitment.
- Be frank about what you have to offer in terms of experience. If you don’t have any experience with an issue facing your Mentee, be honest with her. And, if possible, offer her another resource: Do you know someone she could call who might be able to answer her question? Or, can you get back to her after you have discussed the matter with your network of professionals?
- Be clear with regard to your expectations of the relationship. For your initial meeting, you might prepare a written list of your expectations and encourage your Mentee to do the same. Together discuss and evaluate how compatible your lists are. Be willing to compromise your plans if they do not serve the Mentee’s best interest once you have become better acquainted with her. Help your Mentee set their goals.
• Avoid trying to “fix” your Mentee or solve her problems for her. Providing a neutral and objective perspective is often far more helpful to someone than a quick solution.

• You are encouraged to take every opportunity to include your Mentee in professional events, including those sponsored by the WBC, and introduce her to other professionals that can assist the Mentee.

• Encourage your Mentee to take the initiative in the relationship. Since she will need to develop initiative in order to move forward educationally and/or professionally, practicing doing so within your relationship can become an invaluable experience.

• Keep a log of experiences you deem useful to share with your Mentee. Perhaps clip relevant newspaper articles or record useful web addresses to share when you meet.

• Ensure you provide feedback on your progress with the Mentee, issues (if any arise) to the WBC Mentoring Committee as required.

• You are to act as a professional advisor to your mentee; you should not intervene in complicated personal issues or mental health concerns. If your Mentee discloses such an issue to you, please do not attempt to handle it yourself. You may refer her to the WBC Mentoring Committee, who can connect her with appropriate resources.

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1 – See Section 5 for guidelines on mentor / mentee meetings
2 – All mentor applications are subject to background checks

4. **Mentee Guidelines**

A Mentee is a person who seeks guidance and support in order to establish and reach her career goals. She may think of herself as an apprentice or student who can benefit from the wisdom of a more experienced professional. With this definition in mind, the following guidelines may be helpful:

• Take initiative - assume an active role in creating a relationship with your Mentor that will help you grow professionally. Being proactive is necessary to build a successful career, and you can begin developing this skill by practicing it with your Mentor. Get out there! Be excited, make the initial call, set the meeting, and come prepared with items to discuss.

• Work with your mentor to set up regular meetings – be respectful of the time available.

• Set Goals – always a crucial point. One who sets goals is more likely to achieve goals. Assume Responsibility – Be prepared to share your strengths and areas of desired development.

• Follow through – The key to building a relationship is preparing your Mentor to be there for you. Come prepared to make the most of your meetings. Manage the Relationship – set up consistent meetings, keep them, come prepared, ask questions and be open to new ideas.

• Be open to advice and constructive criticism from your Mentor. Trust that she has your best interests in mind and that her wisdom comes from years of experience.

• It might be helpful to keep a written record of questions or issues as they arise at school or work and bring it to the meeting. If you are uncomfortable with this task,
remember that it is normal to have school or work-related problems, that such challenges are not a sign of failure or ineptitude, but rather of growth.

- If for any reason you are uncomfortable with the actions your Mentor is suggesting you to take, please contact the WBC’s Mentoring Committee immediately.

- Please remember that your Mentor is there to offer professional and career guidance; your mentor is not a trained counselor and cannot provide the services of a trained mental health professional. If you find yourself in need of such services, we encourage you to contact your university’s health services office.

Remember that this relationship is meant to be a learning experience for both parties and that WBC Mentoring Committee members are available to help with any challenges.
5. **WBC Mentoring Events**

**Meet in person**
WBC sponsors a number of in person mentoring events – to enable Mentors and Mentees to meet in person and discuss particular topics.

**WBC Mentoring Committee events schedule throughout the year**
The WBC Mentoring Committee has established a calendar of regular events to support resume writing and interviewing. In that context, the WBC Mentoring Committee works closely with the WBC Internship and Jobs Committee to assist the WBC scholarship winners in identifying and interviewing for internship and job opportunities at WBC member firms. A key vehicle in this process is the WBC Resume Book which includes resumes of all Mentees seeking internship or full time opportunities.

Other events during the year are scheduled at appropriate times, which include topical subjects of interest and importance to Mentees such as mock interviews, business writing and others.

<table>
<thead>
<tr>
<th>Month</th>
<th>Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>July:</td>
<td>In person WBC Mentoring community get-together</td>
</tr>
<tr>
<td>August/September:</td>
<td>Conference call / in-person meeting on resume writing skills</td>
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<tr>
<td></td>
<td>Resume writing/ updating for internships</td>
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<tr>
<td></td>
<td>Submission of resumes from all Mentees</td>
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<td></td>
<td>Apply/ interview for full time jobs</td>
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<tr>
<td>October:</td>
<td>Conference call on interviewing</td>
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<tr>
<td></td>
<td>Apply/ Interview for full time jobs</td>
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<tr>
<td>November:</td>
<td>Conference call about internship experiences</td>
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<tr>
<td></td>
<td>Conference call on Business writing</td>
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<tr>
<td></td>
<td>Apply/ Interview for full time jobs</td>
</tr>
<tr>
<td>December:</td>
<td>Interview for internships</td>
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<tr>
<td></td>
<td>Review the semester with Mentor</td>
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<tr>
<td></td>
<td>WBC mentoring program checkpoint</td>
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<tr>
<td></td>
<td>Submit official transcripts to the WBC Business Manager in accordance with the Scholarship Policy.</td>
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<tr>
<td>January:</td>
<td>In person Meeting</td>
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<tr>
<td></td>
<td>Interview for internships</td>
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<tr>
<td>February/March:</td>
<td>Conference call about career experiences</td>
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<tr>
<td>April/May:</td>
<td>Business etiquette in the workplace event</td>
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<tr>
<td>May/June:</td>
<td>Review mentoring relationship</td>
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<tr>
<td></td>
<td>Submit official transcripts to the WBC Business Manager</td>
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<tr>
<td></td>
<td>WBC scholarship award ceremony</td>
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</tbody>
</table>
6. **Meeting Guidelines**

Mentors are expected to help the Mentee achieve at least one of her goals during the length of the Mentoring program. During this time pairs will also get to know one another, resolve any school, professional, or career issues that may arise for the Mentee during this time, and explore new ideas for growth and development.

In addition to attending WBC in-person events, mentor / mentee in person meetings in a neutral location are also encouraged.

Below are high-level guidelines on location, and proposed agenda and structure for mentor/mentee meetings:

**Meeting Location Guidelines:** mentors and mentees are encouraged to attend and meet at WBC related events.

Other one-on-one meetings can be:
- Via phone
- At a neutral location:
  - A coffee shop or diner would provide fewer work-related distractions and place Mentor and Mentee on equal footing.
  - Bars should not be used as meeting locations; participants may be uncomfortable with social drinking due to religion, alcoholism, or a general discomfort with such settings. Also, your Mentee might be a minor.
  - Unless a Mentor has a specific goal such as introducing her Mentee to colleagues, she ought to be sensitive about arranging meetings at her office.
  - Do not ask the Mentee to meet you at your / someone’s home or non-public place. Be cognizant of the amount of time the Mentee will have to travel to meet at the designated place.

**Meeting Agenda for Initial meetings: Getting to know one another**

During the initial meeting pairs should expect to accomplish two tasks:
- Begin to establish a foundation for the relationship
- Begin to explore the Mentee’s goals

An agenda might include the following:
- Share your backgrounds: You can discuss how you came to contact with WBC where you grew up, your interests, plans for the future or studies, likes and dislikes—anything that makes you unique!
- Establish how you are going to communicate with each other. Will the telephone or email work best? How and when will we arrange meetings? Can I call you at work or at home? (You might consider setting up meetings over the months in advance – they can be re-scheduled if need be closer to the meeting date.). Agree on the form of communication between the meetings (email, phone, text).
- Determination of a means of changing the terms of your relationship should you discover that some arrangement is not working.
• Begin to review the Mentee’s goals with the intention of developing a plan on how you will achieve these goals over the next 12 months. Refer to the Goal Setting Tips section for more on how to achieve goals.

3 -See Appendix-B for icebreaker questions to ask each other during the first few meetings

Meeting Agenda for Subsequent Meetings: Doing the Work & Achieving Your Goals
During your next meetings, you will continue to build and strengthen your relationship by working on the Mentee’s goals. How these meetings are structured will depend upon the task at hand and the pace at which the pairs are accomplishing these tasks. You should take as much time as necessary to complete the goal(s) setting process. Please see below Goal Setting Tips for a typical agenda for a meeting to review and enhance goal(s)

• Report of goal-related tasks or other ‘homework’ accomplished by Mentee and/or Mentor since the last time you met.

• Discussion of the next steps for goal attainment. This may be looking at a Mentee’s next goals or even setting new ones. Again, please refer to the Goal Setting Tips in this handbook.

• Review of any challenges Mentee has faced and/or and instructive situations Mentor may have encountered since the last time you met. It may be helpful to record these issues in a log between meetings.

• Discussion of upcoming events, such as networking or cultural events, to attend together, if physical proximity allows. Your meeting may be the attending of one of those events.

Communicate openly and honestly with each other, work on preparing for and obtaining summer internships or a permanent job, and continue to track your progress against your goals.
6. **Goal Setting Tips**

Achieving goals is not always an easy task. Emotions, resources or other life demands can sometimes get in the way of not only setting goals but also achieving them. The following is an overall strategy to help you set and achieve goals.

**Step One: Set goals.**

- ✓ Write them down: The first step to achieving a goal is to put it down on paper. This makes them more ‘real’. Leave your written down goals in a place where you can see them and hence, not ‘lose sight’ of what it is that you want out of life.
- ✓ Be specific: Describe what it is that you want in as much detail as possible. The more specific you can be the easier it will be to attain.
- ✓ Set measurable steps: Once you have your goal, start to think about the steps you will need to take in order to achieve it. Write these down. Again, be as specific as possible.
- ✓ Prioritize: Once you have written down your goals and the steps necessary to achieve them, you may feel overwhelmed. Give each step a number so you know in what order you will start working on each step.
- ✓ Ensure the goal is something you want: Don’t write a goal just for the sake of writing something down.
- ✓ Ensure your goals do not contradict each other: Make sure that your goals are attainable in relation to each other.
- ✓ Realistic: It is important to set goals that you can achieve.
- ✓ Give yourself deadlines: Set specific dates/times that you want to have accomplished your steps/goals.

**Step Two: Complete the steps you have delineated for yourself.**

Once you have written down your plan, start doing the tasks. Actually cross-off completed tasks from your list!

**YEAR 1**

- ✓ Create resume
- ✓ Bimonthly communication
- ✓ Discussion of major, importance of good grades, course selection
- ✓ Summer Internship guidance where appropriate
- ✓ Career guidance
- ✓ Counseling on extracurricular activities

**YEAR 2**

- ✓ Update resume
- ✓ Counseling on extracurricular activities
✓ Career guidance & networking (informational interviews with people in different fields)
✓ Summer Internship guidance
✓ Coursework guidance

YEAR 3
✓ Update resume
✓ Interview Skills
✓ Review of Career Development Resources
✓ Summer Internship guidance
✓ Review presentation/ speaking skills

YEAR 4
✓ Career guidance
✓ Update resume
✓ Making transition from school and work
✓ Money management skills
✓ How to dress
✓ Guidance on graduate programs
✓ Appropriate corporate conduct (communication, etiquette, etc.)

Step Three: Evaluate your progress
Ask yourself the following: Are you following your schedules? Are you meeting your deadlines? Are your goals too easy to attain? Are they too hard? Has something changed in your life that is forcing you to change your goals? This evaluation process will hopefully keep you on track to completing your goals.

Step Four: Re-set Goals
After you have evaluated you goals/progress, you will either need to move on to your next goal or set new ones.
7. **Feedback**

**Mentoring Cycle**
You will want to consider how well your relationship is working and whether a change is in order. Pairs are encouraged to stay together where a relationship is working but change is encouraged where it is not. You will want to count how many meetings you have left and determine how much work still needs to be accomplished. Pairs may also want to discuss their feelings about the relationship and the progress made towards goals. WBC understands that this may not be an easy conversation to have, but it is important in order to put closure on the relationship. Pairs may want to visit this topic more than once. Please do not wait until your last face-to-face meeting to discuss these issues.

Pairs could discuss:
- How do you feel about mentoring in general?
- How do you feel about the progress made towards your goals?
- What kinds of things did you learn/experience in addition to issues related to your goals?
- What do we want to do/need to do during our last meeting(s)?

For questions and comments please contact the Mentoring Committee Co-Chairs

**WBC Evaluation**
You will be contacted by a member of the WBC Mentoring Committee for the purpose of hearing feedback and troubleshooting any issues that might have arisen between you and your Mentor/Mentee, and to make sure that you are in regular contact with each other. If there are any specific concerns, the WBC Mentoring Committee will work with you to address them.

As required by the Scholarship Policy, Mentees should proactively address any scholarship issues with their Mentor in line with Policy requirements.

In addition to informal phone calls / emails to check in, the WBC Mentoring Committee will also send out formal surveys from time to time to collect anonymous feedback on the program.
8. **APPENDIX A - Mentor/Mentee Responsibility Checklist**

<table>
<thead>
<tr>
<th>Action Item</th>
<th>Time Frame</th>
<th>WBC Mentoring Comm. Rep</th>
<th>Mentor</th>
<th>Mentee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attend Events Coordinated for Mentors and Mentee</td>
<td>Ongoing</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Have SMART goals and Developmental Actions Plan templates filled out</td>
<td>Before your first meeting with your Mentor</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Set up first meeting with your Mentor</td>
<td>Within 2 weeks of being matched</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>At your first meeting, discuss how often you will meet up.</td>
<td>Minimum once per month and 1 hour duration in total</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Set up the reoccurring meeting from what you agreed upon at your first meeting</td>
<td>Immediately following your first meeting</td>
<td></td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>Respond / attend to checkpoint meetings held by the WBC Mentoring Committee members</td>
<td>Semi-Annually</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Complete survey sent out by WBC Mentoring Committee Rep to track successes and progress of mentoring program</td>
<td>Yearly</td>
<td></td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
9. **APPENDIX B - Ice-breaker Questions for Mentors / Mentees**

- Tell me a little more about yourself – what are a few things / characteristics you feel are key and unique to you (not on resume / bio / application)?
- What non-work or school related life experiences have shaped who you are today?
- What do you most enjoy about work / school?
- Where do you derive the greatest reward? What areas in your work / school offer the greatest challenges?
- What do you consider to be your greatest Strength? Area of development?
- Describe a time when someone mentored you? What did he/she do that created a positive influence on your growth?