



Association of Public Treasurers of U.S. & Canada Mentoring Program

Welcome

The Association of Public Treasurers of the United States & Canada is proud and honored to have you join our Mentoring Program. As a mentor, you are providing Municipal and County Treasurers, Finance Directors, their assistants, investment and/or budget officers, Clerk/Treasurers, and other public finance professionals with an understanding of all the benefits of membership in the APT US&C. Plus, you are helping them to understand the importance of volunteerism and professional involvement through a strong network of public finance professionals. As a mentee, you are the future of the professional public finance field and the strength of the Association of Public Treasurers of the United States & Canada.

Both as a mentor and mentee, your involvement in the Association of Public Treasurers of the United States & Canada will bring many benefits to you, your colleagues, and the entire association.

- Your involvement is necessary
- Your guidance is appreciated
- Your experience is critical
- Your support is helpful

We hope you will enjoy your year* as either a mentor or mentee in the APT US&C Mentoring Program. The future of the mentoring program is dependent on you. As a mentee, this program will provide experience and guidance from a knowledgeable public finance professional. As a mentor, the program will provide an opportunity to give back to the profession, model volunteerism, and help guide the future of public finance.

*The APT US&C Mentoring program can run for either one or two years, depending on the needs and goals of the mentor and mentee.

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A. Program Description - Mentoring Program*

***A number of items found in this document were developed after reading the Southeastern Library Association's Mentoring Program.**

The APT US&C Mentoring Program has been established in order to provide a method of introducing and encouraging public finance professionals to work together, to network and to support the APT US&C. Mentors are current members of the association who have agreed to help other members learn about the public finance profession in general and more specifically about the different membership benefits of APT US&C. The development of a professional relationship between the mentor and mentee is one of the many benefits of the APT US&C Mentoring Program. The long-term goal of the APT US&C Mentoring Program is to create an interest in public finance professionals working together to create a dynamic professional organization for education and training of public finance professionals.

New members to the association will automatically be contacted by a member of the mentoring program (or someone from APT US&C Headquarters). Upon first contact with the potential mentor, the new member can decide whether they would like to join the mentoring program as a mentee. Existing members will have the opportunity to participate in the mentoring program by choosing to become a mentor on their membership renewal form. Mentors will normally share job titles and/or responsibilities with the mentee in order to provide a more comprehensive relationship.

The APT US&C Membership Committee will pair mentors with their mentee. All attempts will be made to pair mentors and mentees with similar job responsibilities. In order to ease communication between the mentor and mentee, we will pair people in the same state or time zone when possible. Mentors will be provided an email address for their mentee in order to make first contact. The members will be provided the contact information for their mentor to facilitate the introductory process. This information will be delivered to individuals with their membership/renewal information.

B. Mission Statement

The APT US&C Mentoring Program is an invitation for public finance professionals at all levels to learn more about the public finance field, take advantage of education and training opportunities, develop a network with colleagues, and meet their individual potential with assistance from experienced public finance professionals. The Program is designed to help public finance professionals succeed, empower them to make decisions, inform them of methods to improve their delivery of efficient financial services to their community, and promote a sense of belonging.

C. What is a Mentor?

Definition

An APT US&C mentor is an experienced person who willingly provides professional and useful advice to Municipal and County Treasurers, Finance Directors, their assistants, investment and/or budget officers, Clerk/Treasurers, and other public finance professionals in order for them to achieve success in their new or current position and profession.

Qualifications

1. Five (5) years of public finance experience
2. Minimum commitment of one year to the program*
3. Willingness and ability to communicate with mentee as often as necessary, but no less than 6 times during the year
4. Must be an APT US&C member

Role

1. To serve as a guide, sharing your professional experiences, learning opportunities, and networking sources
2. To listen, answer questions, and offer tips and suggestions to improve the mentee's abilities
3. Promote and encourage the importance of participation in APT US&C committees, training opportunities and conferences
4. Help build the mentee's confidence by providing feedback to the mentee regarding his/her strengths and development needs
5. Be a sounding board for ideas
6. Assist in setting goals and strategies for improving mentee's abilities

Benefits

1. Share knowledge and experiences
2. Assist in the growth and education of other public finance professionals
3. Give back what you have gained from APT US&C training and the public finance profession
4. Practice problem solving and listening skills
5. Meet people with diverse experiences, skills, and contacts
6. Collaborate with mentors/mentees who have similar career goals, interests, and job functions
7. Strengthen the APT US&C organization by encouraging the mentee to get involved

Expectations

1. Clarify expectations with the mentee as to the extent to which you will offer guidance
2. Become familiar with the mentee through personal interactions, phone calls and reviewing his/her resume
3. Introduce the mentee to other public finance professionals
4. Share pertinent information and e-mail messages
5. Be honest and professional in all interactions with mentee by following the APT US&C Code of Ethics
6. Attempt to attend the annual APT US&C Conference and provide guidance to the mentee during the conference
7. Promote all of the pertinent APT US&C certifications and training opportunities and continue to review these membership benefits with the mentee throughout the year
8. Submit a yearly report about the mentoring program and your relationship with the individual you mentored to the Chair of the Membership Committee.

*If both the mentee and mentor agree, the mentoring program could be extended to a second year.

D. What is a Mentee?

Definition

An APT US&C mentee or a person being mentored is a Municipal or County Treasurer, Finance Director, their assistant, investment and/or budget officer, Clerk/Treasurer or other public finance professional seeking professional advice and guidance from an experienced public finance professional in order to achieve success in his/her new position or profession.

Qualifications

1. Must be an APT US&C member
2. Be a public finance professional as outlined in the definition above
3. Minimum commitment of one year to the program*
4. Willingness to communicate with the mentor as often as necessary, but no less than 6 times during the year

Benefits

1. Meet finance colleagues with varied experience, skills, and contacts
2. Learn what APT US&C has to offer

3. Practice problem solving and listening skills
4. Network with others in the public finance profession
5. Become a future mentor for other finance professionals

Expectations

1. Communicate effectively with your mentor at least 6 times per year
2. Take initiative and seek professional advice from your mentor when needed
3. Know and be able to discuss your needs and goals with your mentor
4. Receive feedback from your mentor objectively
5. Take responsibility for your career goals
6. Attempt to attend the annual APT US&C Conference and receive guidance from your mentor during the conference
7. Submit a brief yearly report about the mentoring program and your relationship with the individual that mentored you to the Chair of the Membership Committee

* If both the mentee and mentor agree, the mentoring program could be extended to a second year.

E. APT US&C Membership Committee

The APT US&C Membership Committee will maintain and expand the membership benefits of the APT US&C and offer a mentoring program to support public finance professionals as they develop within the profession and the association.

F. Time Line

You can become part of the Mentoring Program at any time.

There is no specific time line for accomplishing different aspects of the mentoring program. Each mentoring pair will work on different projects as they develop.

The APT US&C Mentoring Program is a one-year program, with the possibility of a second year if both the mentor and the mentee feel they would like to work together for an additional year to accomplish the goals they have developed.

G. Suggested Activities for Mentors and Mentees

1. Mentor and mentee develop goals and objectives for their year of mentoring.
2. Mentor suggests APT US&C training seminars and manuals for mentee to attend or purchase.
3. Mentor develops a project that will teach the mentee the benefits of a mentoring program.
4. Have the mentee send an e-mail to APT US&C Board Members and Committee Chairs to ask for advice and tell them why they have been so involved in the association.
5. Mentor assists mentee with developing their skills and presenting themselves professionally.

H. Suggested Activities for Mentors

1. Advise the mentee on how to use their member services and benefits.
2. Show the mentee how to access and take advantage of the association website.
3. Educate the mentee about the many aspects of the association.
4. Guide mentees toward volunteering and leadership roles in the association.

I. Frequently Asked Questions (FAQ)

What is mentoring?

- Listening
- Volunteering
- Supporting and caring
- Setting aside time for the mentee
- Developing
- Encouraging
- Partnership
- Educating

"The concept of mentoring is no longer tailored to tall, hierarchical organizations. Mentoring is now seen as a process whereby mentor and mentee work together to discover and develop the mentee's talents." *Mentoring: How to Develop Successful Mentor Behaviors* by Gordon F. Shea

What is not mentoring?

- Just advising
- Spending more time than you have
- Criticizing
- A lengthy and exhausting relationship
- Hard work

MENTOR:

Why are mentors so important?

Mentors play a significant role in the lives of developing public finance professionals by serving as a teacher, coach, counselor, and role model. They provide feedback and encouragement, offer professional advice, and help others make the connection between their present performance and their future.

I have never been a mentor before; do you offer any training for me?

As a mentor, you will need to have an understanding of the APT US&C and its committees and an interest in providing guidance to someone who seeks your background as a public finance professional. If you are interested in learning about APT US&C and its structure, visit our web site at: www.aptusc.org . If you as a potential mentor are not sure how that you have enough information to share with your mentee, then please contact the APT US&C Membership Chair or attend a workshop orientation for new mentors/mentees that will be provided at every annual APT US&C Conference.

What if I cannot answer the mentee's questions?

Some questions posed to you by your mentee might not be in your field of interest or within your scope of knowledge. When this situation arises, we encourage you to share this with the mentee and forward their question on to the Membership Committee Chair. Notify the mentee that their question has been forwarded and that they will be contacted soon after the Membership Committee Chair receives the question.

What if I'm not comfortable with my proposed mentee?

Please tell us! The purpose of your first meeting is to see whether the two of you are compatible. The match won't be finalized until you have both approved it. Tell us frankly if things aren't working the way you had hoped. If you haven't talked directly with your mentee about issues that are causing disagreement, do so. Often, it will be a question of

miscommunication that can be cleared up through open conversation. The next step is to talk with the Chair of the Membership Committee.

How do I become a mentor?

To become a mentor you need to fill out the APT US&C Mentor Form. After your form has been received and evaluated, the Chair of the Membership Committee will contact you.

MENTEE:

Why have an APT US&C mentor?

Work collaboratively with a public finance professional and learn about the APT US&C organization, how it functions, how you can get involved, and membership benefits available to you.

Who can be an APT US&C mentee?

Any Municipal or County Treasurer, Finance Director, their assistant, investment and/or budget officer, Clerk/Treasurer or other public finance professional who is a member of the APT US&C.

What are the starting and ending dates for the Mentoring Program?

You can become part of the Mentoring Program at any time. It is a one-year commitment. *

During the year you are in the Mentoring Program, it is highly recommended that you attend the annual APT US&C Conference so that you and your mentor can experience the training, education and networking that is the focus of our annual conference.

Is there a fee for joining the APT US&C Mentoring Program?

No, there is no fee to join the APT US&C Mentoring Program.

How many mentees can be involved in the APT US&C Mentoring Program?

There is no limit.

***If both the mentor and mentee agree, the mentoring program could last up to two years.**

Who do I contact for more information on the Mentoring Program?

APT US&C
Membership & Marketing Coordinator
962 Wayne Avenue
Suite 910
Silver Spring, MD 20910
301-495-5560 (Phone)
301-495-5561 (FAX)

Or Chair of the APT US&C Membership Committee:
Daniel Burke
City of Forest Park
1201 West Kemper Road
Forest Park, OH 45240
513-595-5265
dburke@forestpark.org

How do I apply for the APT US&C Mentoring Program?

Complete the APT US&C Mentee Application form

Mail or fax your application form to:

APT US&C
Membership & Marketing Coordinator
962 Wayne Avenue
Suite 910
Silver Spring, MD 20910
301-495-5560 (Phone)
301-495-5561 (FAX)

After I apply for the APT US&C Mentoring Program, who will contact me?

After your application has been received and evaluated, you will be notified by mail and email when you have been accepted into the APT US&C Mentoring Program. Once a mentor is identified, one who matches your area of public finance interests as described by your answers on the mentee's application, he or she will contact you by mail, phone or email. No match between mentor and mentee is complete until both parties agree that they are comfortable with each other.

What will my mentor do for me?

It is up to the mentee to take the initiative and make the APT US&C Mentoring Program a successful experience. Mentors offer information, support, feedback, contacts, and ideas – but the mentee has to take it from there.

What types of things should I ask my mentor?

The types of questions asked vary and there are no right or wrong questions to ask. When you first meet your mentor, ground rules should be set so that each individual in the relationship is comfortable sharing information. As a general rule of thumb, if you are not comfortable asking a question or sharing certain information, then don't share it. As you develop a relationship with your mentor and the comfort level increases, you will eventually feel comfortable discussing issues that at first might seem inappropriate.

Are mentoring connections confidential?

In order to foster open and honest communication, the mentee must be able to trust the mentor not to disclose their discussions with others. Therefore, communication between the mentee and mentor must be kept confidential.

How many times should I meet with my mentor?

The number of times will vary depending on the needs of the pairs. During the year, you should meet or communicate at least 6 times with your mentor. It is up to you on how you do this – face to face, via email, reviewing documents, giving feedback, etc. This is something you and your mentor should agree on at the outset.

Is my mentor available any time day or night?

Your mentor's availability and the best times and methods of getting in touch with him/her are items to discuss during your first meetings. You and your mentor should share your communication styles and specifications to ensure you have the best communication possible and set expectations in that area of your relationship. Our goal is to match mentors and mentees in the same state or time zone to help ease communication.

Who can I go to if I have questions about the effectiveness of my mentor or the program?

The Chair of the APT US&C Membership Committee. The Chair will follow up periodically with both mentors and mentees to inquire how the relationship is progressing.

Are there certain things that I should or shouldn't do as a mentee?

Always be open, honest, and respectful with your mentor, and the relationship and work you are doing together.

If I lost my mentor's email address/phone number/ mailing address, how can I obtain that information?

Contact the Chair of the APT US&C Membership Committee.

What if I'm not comfortable with my proposed mentor?

Please tell us! The purpose of your first meeting is to see whether the two of you are compatible. The match between the mentor and mentee will not be finalized until each person has approved it.

Tell us frankly if things aren't working the way you had hoped. If you haven't already talked directly with your mentor, do so. Often, it is a question of miscommunication that can be cleared up by discussing the issue. The next step is to talk with the Chair of the APT US&C Membership Committee.

If I have a complaint or a suggestion to improve the Mentoring Program, whom can I contact?

Your comments are very important to us and we appreciate all types of feedback. Please send questions and comments via email to either your mentor or the Chair of the APT US&C Membership Committee.

ASSOCIATION OF PUBLIC TREASURERS OF THE U.S. & CANADA:

What are the goals of the APT US&C Mentoring Program?

Goal #1

The Mentoring Program will pair a Municipal or County Treasurer, Finance Director, their assistant, an investment and/or budget officer, a Clerk/Treasurer, or other public finance professional with an experienced public finance professional who is a member of APT US&C.

Objective

The experienced public finance professional will provide guidance and leadership through modeling and instructing the mentee of all the benefits of membership in APT US&C. The mentor will encourage and assist the mentee in developing a strong network of other public finance professionals to seek advice when necessary.

Goal #2

The mentee will develop a better understanding of APT US&C, its organization and committee structure, and how they function.

Objective #1

The mentor will educate the mentee on how APT US&C is organized. The mentor will inform the mentee of what the different committees are involved in and how the mentee can get involved as part of a committee.

Objective #2

The mentee will gain an understanding of the importance of volunteerism and being involved in a professional organization.

Goal #3

Within 3 months, the mentor and mentee will develop a time-line to accomplish specific professional goals that both agree on.

Goal #4

The mentee, upon completion of the program, is encouraged to become actively involved in one or more APT US&C committees.

Objective #1

The mentee will become involved by joining an APT US&C Committee.

Objective #2

The mentee may eventually become a committee chair and participate at the conference as a moderator.

APT US&C MEMBERSHIP COMMITTEE:

What is the role of the Membership Committee as it relates to the Mentoring Program?

1. Recruit mentors
2. Develop criteria to match mentors and mentees
3. Evaluate the goals and objectives of the mentor and mentee
4. Match mentors with mentees
5. Train new mentors
6. Encourage and support leadership development for public finance professionals within APT US&C
7. Provide an orientation for new mentors and mentees at the APT US&C annual conference
8. Design an application form requesting relevant information in order to help in matching mentors with mentees
9. Write a brief guide designed to help new mentors and mentees understand the mentoring program
10. Provide support by checking with the mentor and mentee and offer resources if needed
11. Obtain evaluations from mentors and mentees to assess the effectiveness of the program on an annual basis

How will the APT US&C Mentoring Program be evaluated?

Each pair will define their own goals in a contract at the beginning of the mentoring year. The mentor and mentee will be responsible for evaluating their progress toward meeting the mentor's/mentee's goals and objectives. The Chair of the Membership Committee will provide support by checking with the mentor and mentee, and offering resources when they are needed. In addition, the Chair of the Membership Committee will ask the mentor and mentee to evaluate the program to see if it is successful, either after one year or the optional second year of the program.