



# The WASBO Mentorship Handbook



*Helping School Business Officials Succeed*

Developed by  
**The WASBO Professional Improvement Committee**  
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[www.WASBO.com/Mentorship](http://www.WASBO.com/Mentorship)

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# Chapter 1 – Program Overview

## **WASBO Mentoring Program and Introduction**

A mentorship is a supportive relationship established between two individuals where knowledge, skills, and experience are shared. The protégé is someone seeking guidance in developing specific competencies, self-awareness, and skills early in their career. The mentor is a person who has the experience and expertise in the areas of need identified by the protégé and is able to share wisdom in a nurturing way.

In this relationship, the protégé has the opportunity to ask questions, share concerns, and observe a more experienced professional within a safe, protected environment. Through reflection and collaboration between the pair, the protégé can become more self-confident and competent in their application of knowledge and skills gained in their training.

No two mentorship relationships are the same; the relationship established is unique based on their needs, personality, learning styles, expectations, and experiences. Mentorship can provide one or all of the following: regular opportunities for individuals to reflect together about their hands-on work; an opportunity for skill development measured in competencies gained; a significant, long-term effect on the life or work style of another person.

## **Program Operation**

WASBO has developed a process to be used to identify program participants and has established the roles and responsibilities for regional levels. Candidates for the mentorship program may be identified in a variety of ways including: by the hiring entity such as a school district or CESA; by a WASBO regional representative; or through self-referral. In all cases, the referrals should be directed to WASBO Mentorship Program Coordinators:

- Sue Schnorr, [sue.schnorr@wasbo.com](mailto:sue.schnorr@wasbo.com) or (920) 340-0157
- Jill Bodwin, [jill.bodwin@wasbo.com](mailto:jill.bodwin@wasbo.com) or (920) 901-1930
- Mike Barry, WASBO Executive Director, [mike.barry@wasbo.com](mailto:mike.barry@wasbo.com) (608) 249-8588

The Mentorship Program Coordinators manage the program at the state level. They are responsible for notifying the appropriate regionals of the names of eligible candidates requesting a mentor, arranging the training of all mentors and protégés, and maintaining an appropriate evaluation component.

The Coordinators will work with the Regional Representatives to secure an appropriate pool of experienced business officials willing to serve as mentors. The WASBO Mentorship Program recommends business officials to have at least five years of in-state experience in the profession and to have completed the prescribed training prior to serving as mentors.

## **Characteristics of Quality Mentors**

Successful mentors share many common characteristics or traits. They are experienced in the field of school business management and possess a willingness to share skills, knowledge and expertise. These mentors demonstrate a positive attitude and act as a positive role model exhibiting enthusiasm for the profession. Effective written and verbal communication, as well as ongoing personal and professional goals, are present. In addition, they value ongoing learning and professional development. Most importantly, they foster, convey and uphold the standards, norms, and values of the school business profession including the WASBO Code of Ethics. Most important, successful mentors have the ability to:

**Relate** – The development of a positive, trusting relationship is the hallmark of a successful mentorship. The mentor must utilize a variety of interpersonal skills to nurture the relationship, establish trust, and reflect a positive and caring attitude. Only after the establishment of a positive relationship will a mentor and protégé progress to the level of confidentiality and risk taking necessary for an effective mentorship.

**Communicate** – The ability to listen and communicate effectively with others is paramount. This is one of the most difficult traits to execute successfully on a consistent basis. Constant effort must be made to keep the lines of communication open and vibrant.

**Educate** – Mentors are the professionals who are committed to sharing their knowledge and expertise. They need to recognize the needs of others and know when to offer support, direct assistance or promote independence. Mentors are dedicated to the profession and reflect a high level of integrity, competence and responsibility.

**Collaborate** – Collaboration includes the sharing of ideas and expertise. It engenders the creation and participation in a learning team. Collaborators are approachable, flexible and supportive. A mentor approaches the mentorship as an interactive enterprise where they will gain as much as the protégé from the partnership.

**Evaluate** – The mentor must be able to provide insightful observations and constructive feedback. Appropriate evaluation techniques can help protégés attain insight into unproductive behaviors, and evaluate their capacity to change. The mentor's over-all role is to meaningfully assist in the development of protégés rather than allowing them to avoid difficult, but relevant issues.

**Model** – Mentors need to share life experiences with protégés in order to personalize and enrich the relationship. The mentor as “role model” can help motivate protégés to take necessary risks, to make decisions and take actions without the certainty of successful results, and to overcome difficulties in the journey toward professional and personal growth.

## **The WASBO Mentorship Program and Application**

Mentoring has been and continues to be an accepted and successful practice and powerful tool for training professionals and supporting adult learning in business and industry, education, and many other professional fields. While the approaches and level of sophistication may vary from program to program, the desired outcomes of successful programs are generally the same and focus on strategies that assist individuals to be or become more effective within the context of their organization.

The WASBO mentor program is designed to provide technical assistance and advice to first and second year school business officials relative to the myriad of duties and responsibilities that are inherent within every school business official's job description. This is accomplished by pairing new business officials on a one-to-one basis with experienced veterans.

### **What are the Goals of this Program?**

The mentor program is designed to accomplish the following specific goals:

- To provide opportunities for new school business officials to acquire the performance skills and knowledge necessary for the effective implementation of their job responsibilities
- To provide a resource in order to facilitate decision making associated with the particularly difficult challenges and problems that occur within the frame of reference of a school business official's position
- To develop a cadre of experienced school business officials who would be willing to participate in the implementation of mentor activities

## **Roles and Responsibilities of Mentors and Protégés**

A mentorship is a supportive relationship established between two individuals where knowledge, skills, and experience are shared. The protégé is someone seeking guidance in developing specific competencies, self-awareness, and skills early in their career. The mentor is a person who has the experience and expertise in the areas of need identified by the protégé and is able to share wisdom in a nurturing way.

In this relationship, the protégé has the opportunity to ask questions, share concerns, and observe a more experienced professional within a safe, protected environment. Through reflection and collaboration between the pair, the protégé can become more self-confident and competent in their application of knowledge and skills gained in their training.

No two mentorship relationships are the same; the relationship established is unique based on their needs, personality, learning styles, expectations, and experiences. Mentorship can provide one or all of the following: regular opportunities for individuals to reflect together about their hands-on work; an opportunity for skill development measured in competencies gained; and a significant, long-term effect on the life or work style of another person.

### **Qualities and Characteristics of Effective Mentors**

- Experienced in the field of school business management
- Willingness to share skills, knowledge, and expertise
- Demonstrates a positive attitude and acts as a positive role model
- Exhibits enthusiasm in the field
- Values ongoing learning and professional development
- Demonstrates effective written and verbal communication
- Sets and meets ongoing personal and professional goals
- Fosters, conveys, and upholds the standards, norms, and values of the school business management profession including the WASBO Code of Ethics

### **Mentor Roles and Responsibilities**

- Enhance the professional development and success of protégés who are new, need to develop new levels of expertise, are making a career change, or wish to advance in the profession
- Support the relationships between the protégé and others in his/her district
- Provide constructive feedback for the protégé
- Commit to being available and accessible in both a structured or informal manner to the protégé
- Serve as a resource and coach to the protégé during the development of the protégé's state required Professional Development Plan (PDP)
- Provide specific, practical information about the school business management profession sharing knowledge, insights, materials, skills, and experience with protégé
- Maintain confidentiality of information shared by the protégé
- Encourage the development of leadership competencies
- Help protégé bridge the gap between theory and practice
- Assist protégé in setting priorities and in juggling the demands of the position
- Participate in assessing the WASBO Mentorship Program

### **Protégé Roles and Responsibilities**

- Be receptive to guidance and willing to learn
- Complete and share a self-assessment
- Commit to personal growth, continuous learning, and excellence in the profession
- Commit to being available and accessible in both a structured or informal manner
- Attend local regional meetings and participate in professional development opportunities
- Seek to understand and uphold the standards, norms, and values of the school business management profession including the WASBO Code of Ethics
- Commit to the process of reflection, goal-setting and completion of a Professional Development Plan (PDP)
- Participate in assessing the WASBO Mentorship Program

## **Mentorship Relationships**

Successful mentorship relationships usually benefit everyone involved – the protégé, the mentor, the organizations with which each are affiliated, and the profession.

### **Benefits to the Protégé**

Once a mentoring relationship has been established, the protégé has access to opportunities that may otherwise be unavailable. Benefits from mentoring relationships include the following:

- Smoother transition into the profession of school business management
- One-on-one attention from a professional who has expertise and is willing to support your unique professional needs
- Opportunity to share ideas with someone else in the same profession
- Guidance and helpful advice in their development as a professional
- New and/or different perspectives
- Assistance with the integration of knowledge and skills learned from conferences, workshops and reading materials
- Knowledge and wisdom that only experience can provide
- An opportunity to build a network of contacts in the field and network within the professional community

### **Benefits to the Mentor**

Mentors can obtain a great deal of satisfaction from helping a less experienced protégé. Benefits include the following:

- Gained knowledge from more recent training of protégé
- Opportunity to determine their leadership capabilities
- Renewed enthusiasm for the role of the experienced professional
- Enhanced skills in coaching, counseling, listening, leadership, and modeling

### **Benefits to Both School Districts**

The employers of both the mentor and protégé benefit from the growth of each individual. The school district that employs the protégé benefits from the more rapid development of the individual. They benefit from:

- Increased morale, productivity, and effectiveness
- Shortened time required for new administrator to develop the necessary competencies
- Reduced risk of errors or missed opportunities for the district
- The mentor's district gains from the newer information or theories shared by the protégé and from the increased leadership abilities of the mentor
- Greater retention of qualified candidates

## **School Business Management Mentorship Program Operation**

### **Participation**

Participation is available to all District Professional Members with school business management responsibilities. While all new WASBO members are eligible to participate in the program, current WASBO members may wish to be assigned a mentor as well. The mentorship program is designed to assist those:

- Beginning their careers in school business management, whether under a provisional or 08 licenses, or by virtue of their current responsibilities in this field
- Changing positions within the state
- Assuming positions in Wisconsin after practicing in another state(s)
- Wishing to become more knowledgeable in specific areas

### **Identification of Program Candidates**

Candidates for the program may be identified for participation in the mentorship program by any of the following means:

- Self-Referrals. Individuals may contact the Mentorship Program Coordinators or the WASBO Executive Director directly indicating an interest in entering the School Business Management Mentorship Program
- Employer Referrals. Local administrators may contact the Mentorship Program Coordinators or the Executive Director to request a mentor for an individual with school business management responsibilities in his or her district
- If individual WASBO members or regional chairpersons initiate or receive initial referrals, they are to forward them to the Mentorship Program Coordinators or the WASBO Executive Director
- Referrals from WASBO Office. The WASBO Executive Director and/or office staff may refer individuals to the Mentorship Program Coordinators to request a mentor.

### **State Level Responsibilities**

The Mentorship Program Coordinators, as a designee of the WASBO Executive Director, will coordinate the School Business Management Mentorship Program.

- The Mentorship Program Coordinators, as a designee of the WASBO Executive Director, will coordinate the School Business Management Mentorship Program.
- Referrals of candidates to the program will be made to the Mentorship Program Coordinators
- It is the Mentorship Program Coordinator's responsibility to notify the appropriate regionals of the names of eligible candidates requesting a mentor, arrange for the training of all mentors and protégés and to maintain an appropriate evaluation component
- With the assistance of regional representatives, match mentors and protégés through review of mentor and protégé applications
- Check in on mentor/protégé relationships



## **Regional Representative Expectations and Guidelines**

- Keep track of new hires in their regional
- Notify the Mentorship Program Coordinators of the need for mentors for new hires
- Schedule mentorship as a topic at regional meeting at least once a year with Mentorship Program Coordinators to discuss Mentorship Program
- Recommend matches between mentor and protégé

## **Duration of the School Business Management Mentorship**

While it is recognized that relationships built during a mentorship experience may continue indefinitely, the School Business Management Mentorship Program is designed to extend for one year.

The level of involvement is under the joint control of the new business official and his/her mentor. Activities range from infrequent telephone communications to periodic meetings where important experiences are shared and advice rendered. This unstructured approach enhances program flexibility, which is necessary so that individual needs can be addressed. However, the expectation of the mentor is that his or her commitment to be attentive and available to the needs of the protégé to insure his or her success. Therefore, availability to respond to frequent questions and contact is important.

## **Mentorship Training**

Mentorship training will be provided to mentors and protégés. A handbook that provides information and resources for the Mentorship Program will be provided to both the mentor and the protégé.

## **School Business Management Mentorship Program Evaluation**

An evaluation of the School Business Management Mentorship Program will be conducted regularly. This will involve surveying both mentors and protégés to determine the quality and effectiveness of the program in order to make improvements in the training and delivery of the program.

## **Continual Monitoring and Evaluation**

Effective mentoring programs include a process that provides opportunities for both informal and formal monitoring and evaluation. The process should focus on strengths and areas needing improvement. The design should include both qualitative and quantitative measures and assess both the process and end product. The results should be used to assess progress, make data driven changes, and improve the process and end product.

## MENTOR SELF-ASSESSMENT AND REFLECTION

The checklist below is designed to assist an individual who is thinking about becoming a mentor. The checklist provides an opportunity to assess and reflect on one’s strengths or weaknesses relative to the qualities thought to be conducive to successful mentoring. The checklist is intended to be a self-assessment look to aid in the decision to become a mentor and is yours to keep. There is no single “ideal profile” but those who agree or strongly agree with many of these statements are likely to serve well as mentors.

	Strongly Agree 1	Agree 2	Neutral 3	Disagree 4	Strongly Disagree 5
1. I am a good listener and respect my colleagues					
2. I see myself as people-oriented					
3. I set high standards for myself and others					
4. I enjoy being a school business official and working with others in the profession					
5. I am sensitive to the needs/ feelings of others					
6. I want to contribute to the professional development of others and to share what I have learned					
7. I recognize when others needs support, direct assistance, or independence					
8. I am approachable, flexible, and willing to adjust my personal schedule to meet the needs of someone else					
9. I am patient and tolerant when teaching someone					
10. I am able to give constructive feedback					
11. I am confident and secure in my knowledge of school business and make an effort to remain up-to-date					
12. I attend WASBO meetings and workshops on a regular basis					
13. I am able to explain things at various levels of complexity and detail					
14. I am able to support and help without smothering, parenting, or taking charge					
15. I am open-minded and able to value different perspectives					

	Strongly Agree 1	Agree 2	Neutral 3	Disagree 4	Strongly Disagree 5
16. I have the skills to assess a situation objectively and to take the correct action					
17. I do not engage in behavior or conversation that undermines the relationships of others					
18. I can admit mistakes and learn from them					
19. Overall, I see myself as a competent professional					
20. I have been a member of WASBO for at least five years					
21. I can make a commitment to being a mentor for at least one year					
22. I am committed to pursuing the mentoring relationship in a fashion that provides a positive growth experience for my protégé and myself					
23. I am familiar with the ASBO Standards and WASBO Code of Ethics					
24. I address ethical issues in my area of responsibility head-on					
25. I support the actions of colleagues whenever possible, refraining from publically criticizing board members, administrators, or other officials					
26. My unique and special assets for mentoring are:					

**WASBO MENTORING PROGRAM  
MENTOR APPLICATION**

Name: \_\_\_\_\_

Title: \_\_\_\_\_ District: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Matching Information** To help in matching, please tell us about yourself.

Job Responsibilities: \_\_\_\_\_

District Enrollment: \_\_\_\_\_

Employed at current district since: \_\_\_\_\_

Years of school district experience: \_\_\_\_\_

WASBO Regional: \_\_\_\_\_ CESA \_\_\_\_\_

Certifications/Licensures held: \_\_\_\_\_

Are you currently a WASBO member?    Yes    No    If yes, for how long: \_\_\_\_\_

What do you hope to achieve by participating in the WASBO mentoring program:

\_\_\_\_\_

\_\_\_\_\_

Is there any other information WASBO should know about your preferences:

\_\_\_\_\_

\_\_\_\_\_

**Program Commitment** I understand that working in a mentor/protégé relationship can be an extremely rewarding experience, and I appreciate that the beneficial outcomes require:

- A professional commitment to share openly, to communicate effectively, and to learn from each other;
- A personal commitment of my time to attend training to be a mentor; and
- A recognition and agreement to the mentor responsibilities as listed in the attached description of the mentoring program.

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_

Return to: WASBO Mentorship Program, 4797 Hayes Road, Suite 101, Madison, WI 53704

## PROTÉGÉ SELF-ASSESSMENT AND REFLECTION

The checklist provides an opportunity to assess and reflect on one's strengths or weaknesses relative to the qualities thought to be conducive to successful mentoring.

	Strongly Agree 1	Agree 2	Neutral 3	Disagree 4	Strongly Disagree 5
1. I freely and openly share information about my struggles and difficulties					
2. I make my thinking visible for others to see					
3. I do not make judgments until after I understand the issues					
4. I commit my full attention when I listen					
5. I speak up if I think I am misunderstood					
6. I take the risk of communicating my feelings					
7. I encourage others to ask me questions					
8. I answer questions fully, providing insight into my thinking on the issues					
9. I value being asked questions, as they help me better understand the issues					
10. I ask for help whenever I feel I need it					
11. I will tell someone when I don't know the answer to their question					
12. I ask questions of my superiors when I don't understand something they said					
13. I seek frequent and prompt performance feedback					
14. I find ways to use the feedback I receive					
15. I respond to developmental feedback by learning more about what went wrong and how I can do things differently					
16. When the feedback feels personal, I push back by refocusing on the issue or problem					
17. I remain open to feedback, even when it is hard for me to hear					
18. When I receive feedback, I ask for both the data and the reasoning that led to that feedback					

	Strongly Agree 1	Agree 2	Neutral 3	Disagree 4	Strongly Disagree 5
19. I hold myself accountable for my learning and development					
20. I am able to directly ask for support and help when I need it					
21. I work to establish both formal and informal networks to help grow and develop					
22. I show my appreciation when someone offers support or help					
23. After I've started to receive help, I push back when someone begins to take over					
24. I hold myself to high standards of performance and ask for help to achieve those standards					
25. I am familiar with the WASBO Standards of Conduct and use it to guide my decisions and actions					
26. I am familiar with the WASBO Code of Ethics and use it to guide my decisions and actions					
27. I stand up for what I believe					
28. I am able to frame ethical challenges in ways that surface the core issues					
29. I address ethical issues in my area of responsibility head-on					
30. I support the actions of a colleague whenever possible, refraining from publicly criticizing board members, administrators, or other officials					
31. My unique and special assets are:					

**WASBO MENTORSHIP PROGRAM  
PROTÉGÉ APPLICATION**

Name: \_\_\_\_\_

Title: \_\_\_\_\_ District: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**Matching Information** To help in matching, please tell us about yourself.

Job Title: \_\_\_\_\_

Job Responsibilities: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

District Enrollment: \_\_\_\_\_

Previous School District Experience: \_\_\_\_\_

\_\_\_\_\_

Previous Non-School District Employment: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Post-Secondary Education: Coursework \_\_\_\_\_

Highest Degree \_\_\_\_\_

WASBO Regional: \_\_\_\_\_

CESA \_\_\_\_\_

Certifications/Licensures held: 08 School Business Manager \_\_\_\_\_

Other: \_\_\_\_\_

What do you hope to achieve by participating in the WASBO mentoring program:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Is there any other information WASBO should know about your preferences:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Program Commitment** I understand that working in a mentor/protégé relationship can be an extremely rewarding experience, and I appreciate that the beneficial outcomes require:

- A professional commitment to share openly, to communicate effectively, and to learn from each other;
- A personal commitment to be receptive to guidance and willing to learn; and
- Attend local regional meeting and participate in professional development opportunities.

Signed: \_\_\_\_\_ Dated: \_\_\_\_\_

Return to: WASBO Mentorship Program, 4797 Hayes Road, Suite 101, Madison, WI 53704

## WASBO Mentoring Agreement

We are both voluntarily entering into this partnership. We wish this to be a rewarding experience.

1. The mentoring relationship covers the period from \_\_\_\_\_ to \_\_\_\_\_. This period will be evaluated every three to six months and will end by agreement once we have achieved as much as possible.
2. Expectations we have of each other:
3. How often, when and where we will meet:
4. Beyond face to face meetings, other ways we will communicate:.
5. Any limits or constraints that will affect our interaction (time, travel etc.) and how will we resolve these:
6. We agree that the role of the mentor is to:
7. We agree that the role of the protege is to:
8. We agree to keep the content of these meetings confidential.
9. The mentor agrees to be honest and provide constructive feedback to the protégé.. The protege agrees to be open to the feedback.

Date: \_\_\_\_\_

Mentor's signature: \_\_\_\_\_

Protégé signature: \_\_\_\_\_

Date for Review: \_\_\_\_\_



## WASBO MENTORSHIP – Mini Guide for Mentors

1. Meet personally with your protégé for a “First Meeting.” Go to their District if possible. (See ideas below)
  - A. Go over the Mentoring Agreement and both sign. This will provide a framework for future contact and communication
  - B. Have your protégé fill out the protégé assessment and review with them where their greatest needs are
  - C. Observe their office and work area to understand their work environment
  - D. Go over WASBO events they can attend, including Regional Meetings and conferences
  - E. Make sure they are connected with the DPI Financial website
  - F. Find out their background and personal life (i.e., married, kids etc.)
  - G. Discuss any major challenges or hurdles they may have
2. Stay on schedule as agreed in the Mentoring Agreement. Develop prompts on your calendar so time doesn't get away from you
3. When major DPI deadlines, Regional Meetings or Conferences are occurring, send them a quick email as a reminder.
4. At conferences you both are attending, make sure you set up a time to meet and check-in. Don't forget to invite them to go out to eat in the evening at conferences.
5. Attend Mentorship activities at conferences. There may be a breakfast or evening reception at a particular conference (typically at the Fall Conference, the Accounting Conference and Spring Conference).
6. Be vigilant and take the initiative in keeping in contact.

### **Sample Initial Meeting Conversation with Protégé**

- I'd like to get to know you better. Can you tell me something about yourself, your family, your hobbies or what you like to do during your time away from work?
- What drew you to this profession? Did you receive formal training in school business?
- Have you worked in a school district prior to this position? If yes, what position and where?
- In which area of business management do you feel most qualified?
- In which area do you feel may need the most support?
- Is there an upcoming project or due date that you are feeling anxious about? Is there something you have in mind that needs immediate support?

## **Ten Practical Tips for Mentors**

Over the last ten years or so, mentor programs have blossomed across the country. We often think commitment and action are all it takes to make good things happen. Research shows, however, that effective mentoring takes much more. To help these efforts be successful, author, Nancy Henry, of the Northwest Regional Educational Laboratory, offers the following ten tips for effective mentoring.

1. ***Maintain regular contact.*** Mentors should assume that they are the givers in the relationship. Consistent contact models dependability and builds trust. At least monthly contact is recommended.
2. ***Always be honest.*** Trust and respect are the foundation on which mentorships are built.
3. ***Avoid being judgmental of a colleague's situation.*** Acceptance without conditions communicates that your concern comes without strings attached.
4. ***Avoid doing the job for the protégé.*** Don't do for a colleague what she/he can do for him/herself. Your greatest gift is to help a person discover his/her own solutions to problems.
5. ***Don't expect to have all the answers.*** Sometimes just listening attentively is all people need.
6. ***Help your colleague access resources and expand support networks.*** Discuss the importance of maintaining positive relationships.
7. ***Be clear about your expectations and your boundaries.*** Set up ground rules and communicate them.
8. ***Avoid being overwhelmed by your colleague's problems.*** Remain calm and dispassionate to help colleagues solve problems.
9. ***Respect confidentiality.*** Good friends do.
10. ***If the relationship seems to stall, hang in there.***

## **Expectations for the Mentor**

Establish and maintain frequent and ongoing contact with your protégé.

Develop a positive, professional, supportive relationship with your protégé.

Develop and sustain a plan on how you will work with your protégé over the course of the year.

- Your plans should include methods on how you will hold each other accountable.
- Identify specific goals that your protégé is working to achieve.

Additional suggestions for working with your protégé:

- Weekly e-mails and/or phone calls.
- A minimum of two visits to the protégé's school district (we encourage more if possible or desired).
- Invitations for your protégé to join you at your school.
- Face-to-face meetings with your protégé at a WASBO professional development activity.
- Introduction to other professionals and experts in the field (networking).
- Use the online support for administrators through WASBO and other organizations and encourage your protégé to do the same.
- Responses to specific requests that are unique to the protégé, their school situation, or their district.
- Maintaining data on your form of accountability to each other.
- Feedback to the WASBO Mentorship Program Coordinators on your experience as a mentor.
- Suggestions to the WASBO Mentorship Program Coordinators on methods to improve the process and information.

## Chapter 2 – Working with Your Protégé

The very nature of the mentorship program requires some method for the mentor to assess the needs of the protégé. Time constraints and location proximity required that an expedited process be developed where the mentor can gather a tremendous amount of data relating to the protégé's needs in a concise and consistent manner. The suggested materials can be submitted by the protégé for review by the mentor as time permits. Most, if not all, of the information can be transmitted electronically.

It is suggested that the protégé provide the identified documents to the mentor as soon as possible. A resume, position description and organizational chart should be readily available at the start of the mentorship. It is a quick and easy way to provide the mentor with a synopsis of the protégé's education, training and experiences. It also provides the mentor with a sense of the protégé's job requirements in their district.

UW-Whitewater School Business Management Program has developed a professional assessment tool that when completed will help mentors understand protégés skills and knowledge.

**Protégé Self-Assessment Profile**  
**University of Wisconsin – Whitewater**  
**School Business Management Self-Assessment**

The chart below contains a summary of the knowledge, skills and dispositions (temperament) needed by practicing school business managers. Using the 1 – 4 scale provided, place an “X” in the appropriate box to rate your present level of preparedness in each of the categories provided. This information is not intended to evaluate your present skills, but rather, it will be used as a baseline from which to measure individual growth and program effectiveness.

- 4 – Advanced Complete and outstanding knowledge, skills, and dispositional characteristics expected of a licensed and highly experienced school business manager. ***This level really indicates professional experience in the objective/skill area.***
- 3 - Proficient Consistent, completely developed knowledge and skills and/or important dispositional characteristics to the level expected of a licensed school business manager. This level indicates skill and confidence at a level ready to do the job of a SBM in the particular objective/skill area.
- 2 - Basic Somewhat limited - emerging knowledge and skills and/or important dispositional characteristics expected of a licensed school business manager.
- 1 - Minimal Limited ability to apply expected knowledge and skills and/or important dispositional characteristics expected of a licensed school business manager.

<b>KNOWLEDGE, SKILLS AND DISPOSITIONS</b>	<b>1 Minimal</b>	<b>2 Basic</b>	<b>3 Proficient</b>	<b>4 Advanced</b>
<b>Organization and Administration</b>				
Able to identify and apply techniques for motivating others, delegating authority, decision-making, information processing, planning, and allocating resources				
Understand methods of assigning personnel and resources to accomplish specific goals and objectives and utilizing scheduling techniques for the coordination of tasks to maximize personnel and resource utilization				
Able to identify problems, secure relevant information and recognize possible causes of conflict				
Able to apply questioning techniques, fact finding, categorizing information, and retention of relevant data in the problem solving process				
Able to apply concepts of change, group dynamics, interpersonal relationships, and effective problem solving				
<b>Public Policy &amp; Intergovernmental Relations</b>				

<b>KNOWLEDGE, SKILLS AND DISPOSITIONS</b>	<b>1 Minimal</b>	<b>2 Basic</b>	<b>3 Proficient</b>	<b>4 Advanced</b>
Able to develop and apply policies and rules of local boards of education, state educational authorities, state legislatures, and the federal government				
Able to identify the role of special interest groups (public and private) and their ability to influence those who approve district policy				
Able to analyze the political and legislative process as it relates to local board elections, municipal governments, and state legislatures				
Able to interpret and evaluate local school board policies and administrative procedures to ensure their consistent application in the daily operation				
<b>Legal Issues</b>				
Knowledge of the state and federal constitutional rights that apply to individuals within the public education system				
Able to review and analyze appropriate statutory and constitutional authority regarding the administration of public schools				
Able to review and analyze statutes and case law relative to financial resource management, human resource management, facility management, property management acquisition, information management including freedom of information and protection of privacy, and management of ancillary services				
Able to apply personal “values clarification” and “ethical performance” as it relates to the entire profession of school business administration				
<b>Principles of School Finance</b>				
Able to recognize and forecast the major sources of revenue available to public schools from local, state, and federal levels of government				
Comprehensive understanding of the state funding model				
Able to analyze the impact of shifts in local, state, and federal funding and the effect on local spending plans				
Able to apply multiple techniques for identifying expenditures across cost centers and programs				
Able to identify and analyze the impact of available revenue sources				
Able to recognize and analyze significant social, demographic, and economic changes that may impact the financial plan of the district				

<b>KNOWLEDGE, SKILLS AND DISPOSITIONS</b>	<b>1 Minimal</b>	<b>2 Basic</b>	<b>3 Proficient</b>	<b>4 Advanced</b>
<b>Budgeting &amp; Financial Planning</b>				
Able to prepare a budget calendar to meet the time constraints of budget preparation				
Able to apply techniques for projecting enrollments and personnel projections				
Able to recognize and explain internal and external influences on the budget				
Able to communicate the relationship between programs, revenues, and appropriations of the school district to the stakeholders				
Knowledge of the legal requirement for budget adoption				
Able to forecast anticipated expenditures by program, school and district-wide				
Able to identify various methods of budget analysis and management				
Able to develop multi-year budgets that serve as a communication tool for the stakeholders				
Able to develop a financial model to monitor a school district's health				
<b>Accounting, Auditing and Financial Planning</b>				
Understand the use and role of the internal and external auditor				
Able to establish and verify compliance with finance-related legal and contractual provisions				
Able to prepare, understand, analyze and report financial statements and supporting documents				
Able to communicate the relationship between programs, revenues, and appropriations and the relationship between budgeted and actual values				
Able to understand and apply concepts and standards of accounting, per GASB and GAAP, along with other standards applicable to schools				
Able to report the financial status of the district to the appropriate state agency				

**Cash Management, Investments, Debt Management**

Understand procedures and legal constraints for cash collection and disbursement				
Able to perform a cash flow analysis, including a fund balance report				
Able to develop specifications for selecting banking and other financial services				
Able to calculate the yields and understand the risks of various investment options				
Able to apply appropriate types of short-term debt financing instruments				

**Technology for School Finance Operations**

Working knowledge of current technology applications and programs utilized in the business office				
Able to assess district technology needs, analyze alternative solutions and develop a plan to allocate appropriate resources				
Able to develop an operational plan to meet the financial goals and objectives of a district				

**Personnel & Benefits Administration**

Understand the components of and management issues inherent in the maintenance of a personnel information management database that provides seamless integration with payroll and other school district functions				
Knowledge of the payroll process and ability to evaluate the effectiveness of the payroll operations				
Understand the issues involved in administering employment agreements including interpreting contract language; considering the concept of "past practice," "just cause" provisions, and grievance procedures				
Able to research and explain various compensation arrangements including salaries and wages, employee benefits, and retirement options				

**Professional Development**

Knowledge of strategies for identifying areas and needs for staff development				
Knowledge of effective staff development, supervision, and evaluation systems and their impact on improved staff performance and success in meeting educational objectives				



<b>Labor Relations/Collective Bargaining</b>				
Able to identify and monitor compliance with the grievance procedures as set out in collective bargaining agreements and state law				
Knowledge of local and state laws and regulations with respect to impasse procedures such as mediation, voluntary arbitration, and binding arbitration				
Knowledge of effective negotiation strategies in collective bargaining situations				
Able to develop and analyze models for assessing the cost of current salary and employee benefit packages and proposals				
<b>Human Relations</b>				
Able to identify and implement solutions for conflict resolution and team building				
Knowledge of organizational structure, management theory and leadership styles and their impact on organizational culture				
Able to recognize and promote compliance with standards of ethical behavior and professional conduct applicable to all school district staff				
<b>Facility Planning &amp; Construction</b>				
Knowledge of the components, data needs and process needed to develop an effective long-range facility plan				
Working knowledge of the funding sources and issues related to school construction including bond ratings, the referendum process and construction management				
<b>Maintenance &amp; Operations</b>				
Knowledge of procedures for keeping schools clean, safe, and secure through effective custodial services and preventative maintenance				
Able to conduct analyses and develop plans related to energy consumption and environmental issues				
Understand and apply strategies for determining resource allocation for maintenance and operation				
<b>Purchasing</b>				
Able to apply generally accepted practices and procedures in the purchasing process				
Able to formulate bid specifications and conduct selection analysis				

<b>Supply &amp; Fixed Asset Management</b>				
Knowledge of systems used to manage and track inventories and distribution				
Able to conduct financial analysis of life cycle costs of equipment and other assets				
<b>Real Estate Management</b>				
Knowledge of the procedures for the acquisition and disposal of land and buildings				
Knowledge of real estate management policies and procedures with an understanding of the intergovernmental relationships involved				
<b>Strategic Planning</b>				
Understand the value and the process for developing and communicating a vision of the preferred future of the school district				
Knowledge of and able to analyze the "data-sets" required to facilitate the strategic planning process				
<b>Non-Instructional Program Evaluation</b>				
Able to apply practical and research based knowledge to evaluate support programs and business office services				
Able to analyze, develop, and apply various methods of measuring program outcomes and effectiveness				
Able to effectively manage a change process when evaluation determines that instructional support programs must be improved				
<b>Instructional Program Evaluation</b>				
Able to analyze the various economic factors associated with the delivery and evaluation of instructional programs				
Understand and apply methods for directing and promoting the allocation of resources toward the improvement of instructional programs				
Understand methods of directing and promoting the allocation of resources for professional development leading to improved instructional programs				
<b>Communications</b>				
Knowledge of the major constituencies within the school district				
Able to present financial data for consumption by school and community groups in written, oral and multi-media formats				
Able to develop a plan for positive school-community relations program for the business office and the school district				

**Management Information Systems**

Have a working knowledge of the technology and software that is available for school and business office use				
Familiar with sources and types of data needed for local analysis, decision making and governmental reporting				
Able to apply current technology in the day to day operation of the business office				

**Risk Management**

Aware of the legal requirements for school district insurance coverage				
Able to identify and evaluate alternative methods of managing risk				

**Transportation**

Knowledge of the legal requirements of the pupil transportation program.				
Able to identify components of an efficient and comprehensive bus routing system				
Aware of issues related to communicating transportation needs to the public, administration, and the state legislature.				

**Food Services**

Knowledge of the legal requirements of the food service program.				
Familiar with procedures for implementing and operating the food service program.				
Able to analyze the methods available for providing food service.				

**WASBO School Business Official Induction Program**  
**Suggested Timeline of Activities for Mentors and Protégés**

TIMELINE	ORIENTATION	MENTORING	PROFESSIONAL DEVELOPMENT
<p>Commencement of Job July</p>	<ul style="list-style-type: none"> <li>◆ Overview of Mentor Program               <ul style="list-style-type: none"> <li>✓ Purpose</li> <li>✓ Services</li> </ul> </li> <li>◆ Suggested in-district activities:               <ul style="list-style-type: none"> <li>✓ Tour district and become familiar with all buildings</li> <li>✓ Gather information on the expectations of the position</li> <li>✓ Understand role in the Administrative Team</li> <li>✓ Confirm areas of supervision – transportation, food service, building and grounds, payroll, etc.</li> <li>✓ Learn about district goals and expectations</li> <li>✓ Meet supervisor, peers and staff</li> <li>✓ Review Roles and Responsibilities</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Mentor and Protégé matching               <ul style="list-style-type: none"> <li>✓ Introduction of mentor and protégé</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Introduction to the Wisconsin Association of School Business Officials               <ul style="list-style-type: none"> <li>✓ Share information on structure of WASBO and Regional membership</li> <li>✓ Enroll in Year of Success Program</li> <li>✓ Notify Regional chairperson to provide contact information</li> </ul> </li> </ul>

TIMELINE	ORIENTATION	MENTORING	PROFESSIONAL DEVELOPMENT
Summer-Fall July-September	<ul style="list-style-type: none"> <li>◆ Identification of specific and major responsibilities</li> <li>◆ Identification of deadlines and associated responsibilities</li> <li>◆ Review of recent school board activities</li> <li>◆ Review of district policies and procedures</li> <li>◆ Review of employee handbooks</li> <li>◆ Suggested activities:               <ul style="list-style-type: none"> <li>✓ Complete Audit</li> <li>✓ Finalize budget, prepare for budget hearing</li> <li>✓ Complete all DPI reports</li> <li>✓ Verify all supplies are ordered for the start of the school year</li> <li>✓ Finalize transportation contract, bus routes, Special Ed. Trans., resolve any conflicts</li> <li>✓ Prepare for benefit presentation for new staff</li> <li>✓ Analyze cash-flow for potential need for borrowing</li> <li>✓ Review liability, property insurance renewal</li> <li>✓ Prepare payroll data for workers compensation audit</li> <li>✓ Oversee completion of summer maintenance projects</li> <li>✓ Review DPI Financial Website and Resources</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Face-to-face meeting with focused discussion on late summer orientation activities               <ul style="list-style-type: none"> <li>✓ Suggested visit by mentor to protégé's office</li> <li>✓ Establish calendar of communications between mentor and protégé (number, type, timeframes, etc.)</li> <li>✓ Identify general and specific goals</li> </ul> </li> <li>◆ Mentor meeting with business official and/or district administrator to share general information about the district (goals, etc.) and any special situations</li> <li>◆ Mentor introduces protégé to networking activities (regional discussion groups, e-mail connections with other area business officials)</li> <li>◆ Ongoing communication focused on:               <ul style="list-style-type: none"> <li>✓ Balancing the demands of private and professional activities</li> <li>✓ Time management skills</li> <li>✓ Identifying priorities</li> <li>✓ Developing effective practices with internal office staff</li> <li>✓ Developing relationships with staff</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Information distributed by WASBO on upcoming conferences and workshops</li> <li>◆ Attend WASBO/DPI New Business Administrators Conference (Year of Success)</li> <li>◆ Planning for participation in upcoming state and national conferences and workshops               <ul style="list-style-type: none"> <li>✓ Attend Regional Business Official Meeting</li> <li>✓ Mentor-protégé meeting at identified conference sessions</li> <li>✓ Identify and attend relevant sessions to support new position</li> </ul> </li> <li>◆ Participate in mentor-protégé face-to-face meetings at WASBO Fall Conference</li> </ul>

TIMELINE	ORIENTATION	MENTORING	PROFESSIONAL DEVELOPMENT
Late Fall October- December	<ul style="list-style-type: none"> <li>◆ Suggested activities               <ul style="list-style-type: none"> <li>✓ Amend budget/finalize levy in October</li> <li>✓ Certify levies to townships</li> <li>✓ Monitor purchasing, schools compliance with bidding procedures</li> <li>✓ Monitor cash-flow/investment – ongoing</li> <li>✓ Review and update board policies pertaining to operations</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Ongoing communication focused on:               <ul style="list-style-type: none"> <li>✓ The wide and varied demands required of a new administrator</li> <li>✓ The importance of networking with others to share ideas, frustrations, and gather best practices from others</li> <li>✓ Time management skills</li> <li>✓ Assessment of performance at completion of first quarter of the school year</li> <li>✓ Celebrate success stories</li> <li>✓ Maintaining balance between professional and personal activities</li> <li>✓ Dealing with staff challenges</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Participate in identified targeted sessions to support goals</li> <li>◆ Participate in networking sessions to develop professional relationships, regional meetings</li> <li>◆ Attend Fall Conference and Winter at a Glance (Year of Success)</li> </ul>
Winter December- January	<ul style="list-style-type: none"> <li>◆ Suggested activities:               <ul style="list-style-type: none"> <li>✓ Prepare next year's budget calendar</li> <li>✓ Prepare revenue projections and estimate expenditures</li> <li>✓ Distribute budget information to building administrators</li> <li>✓ Review maintenance needs with Building &amp; Grounds Coordinators</li> <li>✓ Review technology needs for upcoming year</li> <li>✓ Discuss with superintendent regarding attendance at School Board Convention</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Ongoing communication focused on:               <ul style="list-style-type: none"> <li>✓ Rewards of professional administrative experiences</li> <li>✓ Assessment of mid-year progress – what have the mentor and protégé learned together</li> <li>✓ Review of mid-year success stories in the new position</li> <li>✓ Individual motivators</li> <li>✓ Ideas on what to disseminate to staff to gather input on performance</li> <li>✓ Celebrate success stories</li> <li>✓ Identify challenges</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Consider Attending State Education Convention for networking with board members and other districts</li> <li>◆ Participate in various focused workshops or seminars (WASB Negotiations, insurance, etc.)</li> <li>◆ WASBO Luncheon Meeting at Convention</li> </ul>

TIMELINE	ORIENTATION	MENTORING	PROFESSIONAL DEVELOPMENT
Early Spring February – March	<ul style="list-style-type: none"> <li>◆ Suggested activities:               <ul style="list-style-type: none"> <li>✓ Continue work on next year's budget</li> <li>✓ Review employee handbooks and/or union negotiations</li> <li>✓ Review current year expenditures and estimate unexpended funds in large budget areas (utilities, transportation, salaries, benefits, etc.)</li> <li>✓ Review grant expenditures to ensure compliance and acceptable carry-over</li> <li>✓ Prepare enrollment projections</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Ongoing communication focused on:               <ul style="list-style-type: none"> <li>✓ What are the best practices the protégé has developed and instituted?</li> <li>✓ How will the protégé use the learning to improve over the second semester and next year?</li> </ul> </li> <li>◆ Potential mentor visit to the protégé's office</li> </ul>	<ul style="list-style-type: none"> <li>◆ Potential opportunity for face-to-face mentor-protégé meeting</li> <li>◆ Attend WASBO Accounting Conference</li> <li>◆ Attend federal Funding and Accounting Conferences (Year of Success)</li> </ul>
Late Spring April-May	<ul style="list-style-type: none"> <li>◆ Suggested activities:               <ul style="list-style-type: none"> <li>✓ Communicate with staff – retiring, laid off, or resigning regarding benefits</li> <li>✓ Evaluate Business Office staff</li> <li>✓ Obtain insurance renewals</li> <li>✓ Process purchase orders for materials for the start of next school year</li> <li>✓ Review Student Insurance Program</li> <li>✓ Review school lunch fees for the upcoming school year</li> <li>✓ Finalize budget</li> <li>✓ Review and renew any contracts with vendors and or providers</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Ongoing communication focused on:               <ul style="list-style-type: none"> <li>✓ Plan for the completion of the first year in the new position</li> <li>✓ Planning for the upcoming year while completing the current year</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>◆ Potential opportunity for face-to-face mentor-protégé meeting</li> <li>◆ Attend WASBO Spring Conference (Year of Success)</li> </ul>

# CHAPTER 3 – Standards

## **WASBO Vision**

To be the most influential Wisconsin organization for state and national school business management and leadership.

## **WASBO Mission**

To provide professional development, to foster a network of support and to advocate for funding that ensures outstanding educational opportunities for all children in Wisconsin.

## **WASBO Code of Ethics**

High standards of ethical behavior for the Professional School Business Official are essential and compatible with the purpose of public education and to their commitment to leadership in the continuing improvement of the educational enterprise. To that end, Professional School Business Officials shall:

- Adhere to local, state and national laws
- Accept responsibility for mastering, contributing to and sharing in the growth of specialized knowledge, concepts, and skills which are necessary to perform their duties
- Perform and direct the Business Functions of the district in full support of educational opportunities provided to “all persons” in the district
- Honor the public trust of the position above any economic or social rewards; not permit considerations of private gain nor personal economic interest to affect the discharge of their professional responsibilities; and recognize that the schools are the public's business and seek to keep the community informed about its schools

## **WASBO Belief Statements**

WASBO believes

- We have a responsibility to develop school business professionals who are visionary educational leaders.
- In being committed to high quality performance, professionalism and ethical standards in all endeavors of the Association.
- We have a responsibility to provide the infrastructure for the delivery of quality educational programs for students.
- In advocating the concept that every child is entitled to a quality education supported by comprehensive school funding systems that are stable, adequate and equitable.
- School Business Officials play a key role in the responsible, equitable and effective use of resources available to educate children.
- We should foster communication by providing networking opportunities, continuing education and training for members and non-members to address the needs of lifelong learners.
- Continuous improvement should be fostered by information, critical evaluation and reflection.



- Enhanced leadership is promoted by mentorship among our members.
- There should be strong alliances among educational organizations.



## **ASBO International's Code of Ethics**

### **Basic Beliefs**

Members and associate members of the Association of School Business Officials International, including its affiliates, are committed to conducting themselves within the highest standards of professional and personal ethics, to continuing ongoing professional growth and development, and to developing these beliefs in others with whom they work.

Members assume the responsibility for providing professional leadership in their schools, communities, and organizations. This responsibility requires members to maintain standards of exemplary personal and professional conduct. To these ends, members subscribe to the following standards.

### **Ethical Standards**

In all activities, members and associate members in good standing of ASBO International and its accredited affiliates shall:

1. Make the well-being of all students, staff, and fellow members a fundamental value in all decision making and actions
2. Fulfill professional responsibilities with honesty and integrity
3. Support the principle of due process and protect the civil and human rights of all individuals
4. Obey all local, state, and national laws
5. Implement the policies and administrative rules and regulations of the employing organization (school district, private school and/or associated organization)
6. Pursue appropriate measures to correct those laws, policies, and regulations that are not consistent with this code of ethics
7. Not tolerate the failure of others to act in an ethical manner and will pursue appropriate measures to correct such failures
8. Never use their positions for personal gain through political, social, religious, economic, or other influence
9. Honor all contracts until fulfillment or release.

### **Ethical Conduct**

In all activities, members and associate members in good standing of ASBO International and its accredited affiliates shall demonstrate their adherence to the standards set forth above by:

1. Actively supporting the goals and objectives of the educational institution with which they work

2. Interpreting the policies and practices of their employer to the staff and to the community fairly and objectively
3. Implementing, to the best of their ability, the policies and administrative regulations of their employer
4. Assisting fellow members, as appropriate, in fulfilling their obligations
5. Supporting a positive image of the educational institution with which they work
6. Not publicly criticizing board members, superiors, administrators, or other employees.
7. Helping subordinates achieve their maximum potential through fair and just treatment
8. Maintaining confidentiality of data and information
9. Accurately and objectively reporting data, in a timely fashion, to authorized agencies.

### **Expectations of Personal and Professional Integrity**

In the conduct of business and the discharge of responsibilities, each member will:

1. Conduct business honestly, openly, and with integrity
2. Avoid conflict of interest situations by not conducting business with a company or firm in which the official or any member of the official's family has a vested interest
3. Avoid preferential treatment of one outside interest group, company or individual over another
4. Uphold the dignity and decorum of their office in every way
5. Never use their position for personal gain
6. Never accept or offer illegal payment for services rendered
7. Not accept gifts, free services, or anything of value for or because of any act performed or withheld
8. Support the actions of colleagues whenever possible
9. Actively support appropriate professional associations aimed at improving school business management, and encourage colleagues to do likewise
10. Accept leadership roles and responsibilities when appropriate.

Failure of an ASBO member to subscribe to and implement the above Ethical Standards and Conduct may result in loss of "member in good standing" status, as set forth in the ASBO International Policies and Procedures.

Notice of Disclaimer: The Association of School Business Officials International (ASBO) assumes no liability, in part or in whole, for results or outcomes stemming from actions, including performance or non-performance, as well as misuse or misinterpretation of these professional standards or code of ethics.

Document may be found at

<http://asbointl.org/resources/professional-standards-code-of-ethics>

## Chapter 4 – Assessing Your Mentoring Effectiveness

The matching of a mentor and a protégé can be a daunting task. Extensive research in analyzing what makes a successful mentor-protégé relationship indicates that issues such as age, gender, ethnicity, and experience are not the dominant determiners of success or failure. It is the mentor's ability to demonstrate proficiency as a relater, educator, collaborator, evaluator and modeler that counts.

You are invited to complete a short assessment. The purpose of the mentor completing the scales is three-fold. First, it provides the mentor with a reference point as to their individual proficiencies in the complete mentor role. The profile can be used to provide a reasonably accurate assessment of actual (based on your prior experience) or probable (based on little or no experience) mentoring styles that will be available to the mentor when dealing with the protégé.

The second purpose is to provide the mentor with self-knowledge and awareness of their mentoring proficiencies. It is assumed that such self-awareness will allow the mentor to function more positively in the mentoring relationship. They will be able to accentuate their strengths and manage their weaknesses when participating in the program.

The third reason for using the Assessment is to provide the mentor with an opportunity to develop alternative approaches for dealing with protégé issues that may fall outside their area of proficiency. For example, a mentor who may feel unsure of how to provide the necessary constructive criticism for the protégé may be able to tap a colleague(s) for their guidance.

## Mentoring Effectiveness Self- Assessment

1.	I refer protégés to other staff members and departments to obtain information relevant to pursuing their individual educational, training and career development plans.	Never	Infrequent	Sometimes	Frequently	Always
2.	I attempt to be verbally supportive when protégés are emotionally upset.	Never	Infrequent	Sometimes	Frequently	Always
3.	Arrange my meetings (when possible) with protégés at times when I will probably not be interrupted very much by telephone calls or other people.	Never	Infrequent	Sometimes	Frequently	Always
4.	I try to stimulate protégés to do more rigorous critical thinking about the long-range implications (time and energy commitments for additional training and education) their career choices may have for increasing the complexity of their lives to help them plan, prepare, and adapt to “predictable” lifestyle changes.	Never	Infrequent	Sometimes	Frequently	Always
5.	I offer recommendations to protégés about their current and future training and educational needs (from basic to advanced skills and learning) based on specific information provided by them regarding their history of previous training, experience, and academic/technical preparation.	Never	Infrequent	Sometimes	Frequently	Always
6.	I follow-up on protégés’ stated goals to develop better personal decision-making strategies relevant to career and educational planning (such as obtaining current information and researching multiple sources) by asking questions and/or offering comments about their actual progress at later meetings.	Never	Infrequent	Sometimes	Frequently	Always
7.	I provide a reasonable amount of factual guidance in our discussions so that protégés will explore realistic options and attainable career objectives.	Never	Infrequent	Sometimes	Frequently	Always
8.	I express my personal confidence in the ability of protégés to succeed if they persevere in the pursuit of their career goals.	Never	Infrequent	Sometimes	Frequently	Always
9.	I encourage protégés to use me as a sounding board to explore their work-related hopes, ideas, feelings and plans.	Never	Infrequent	Sometimes	Frequently	Always

### Mentoring Effectiveness Self- Assessment (cont'd)

10.	I assist protégés in using facts to carefully map out realistic step-by-step strategies to achieve their career, training and educational goals.	Never	Infrequent	Sometimes	Frequently	Always
11.	I discuss my role as a mentor with protégés so that their individual expectations of me are appropriate and realistic.	Never	Infrequent	Sometimes	Frequently	Always
12.	I try to clarify the problems protégés are explaining to me by verbally expressing my understanding of their feelings and the asking if my views are accurate.	Never	Infrequent	Sometimes	Frequently	Always
13.	I emphasize to protégés, especially those who appear uncertain about what to expect from our meetings, that one of my important objectives as a mentor is to be of assistance to them in their personal progress toward training, educational, and career goals.	Never	Infrequent	Sometimes	Frequently	Always