



Mentorship Guide

Southern Association of Student Financial Aid

Administrators

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Overview

Mentorship is a key component in fostering diverse associations and leaders. As seasoned SASFAA aid administrators look down their bench, many recognize that the future of the profession requires them to be involved in mentoring less experienced professionals to continue the growth of the association.

A well-planned, thoughtful mentoring program will encourage people to connect with others on a personal level and build strong, trusting relationships that motivate and guide toward future goals. Investing time in developing a well-organized mentoring program does not only support incoming professionals into the organization but also strengthen the skills of current professionals with, for example, management and collaborative goal-setting skills. A mentoring program can help members of a professional association further their development and network with others in their industry.

A mentoring program benefits the mentee and mentor relationship and helps the organization by building an inclusive mentoring culture centered on learning, sharing new ideas, and creating a shared vision. A mentorship program can diminish isolation and exclusivity, while increasing engagement, retention rates, and skill development.

SASFAA has provided mentoring opportunities for many years to encourage those members newer to the profession to get involved and grow professionally.

There are two basic types of mentors - those found through formal programs, and those formed via organic relationships. The purpose of this guide is to document these various ways SASFAA mentors new members to acclimate them to financial aid in both formats, and to offer future association leaders ideas on how to create a valuable program to benefit SASFAA, the state associations, and our institutions.

Formalized Mentor Programs

A formal mentoring program is a structured, often one-to-one relationship in a work, organization or academic setting. A well-functioning mentoring program requires strategic planning and organization to connect people, increase knowledge and build skills for future goals and milestones. Impactful mentoring programs train mentors and mentees to have productive conversations and meetings, providing them with career development tools and resources to accomplish set goals.

Implementing a successful mentoring program requires identifying the program's purpose and vision, understanding your mentor and mentee pool candidates while incorporating periodic participant check-ins, and consistent communication and promotion to encourage the program's longevity. When done right, a mentoring program in a professional setting is an enjoyable, rewarding experience for organizations and their people.

SASFAA's Formalized Mentor Programs

Mentor/Mentee Program

SASFAA has offered a formalized Mentor/Mentee program in the past, depending on the current President's priorities and goals. In some years, the President has created a formal program, with a Mentoring Chair, where calls went out asking for mentors and mentees. Seasoned aid professionals were asked to volunteer and were connected with newer aid professionals. Mentors were provided with expectations as to the number of times to reach out.

Currently, SASFAA asks the following questions on its membership application:

Would you like a SASFAA Mentor to be assigned to you? (to be a mentee of a seasoned FA professional)

Would you like to serve as a SASFAA Mentor? (to be a mentor to someone else)

The Membership Chair collects this information, and sometimes this data is used for an event at the Annual Conference. The data is not always used, and that could be frustrating to newer members who think they will be getting a contact to assist them. It could also be frustrating for experienced members who are willing to volunteer but are not asked to do anything.

The Membership Committee should include a few members (or a chair) that are dedicated to the mentoring project, and members should be paired up to create relationships. It is recommended that the mentor reaches out to the mentee several times throughout the year to check in and offer assistance.

SASFAA Diversity Leadership Program

In 2016, the SASFAA's Board of Directors declared the association's values and commitment to diversity and inclusion, when it accepted the Diversity Statement, which says:

As part of its mission, SASFAA seeks, accepts, and practices the inclusion and involvement of all members in all association activities regardless of age, race, ethnicity, gender, religion, sexual orientation, disability, appearance, professional level, institutional type, or other uniquely defined characteristics.

In 2020, Mrs. Celena Tulloss who served as the 2020-2021 President of SASFAA, wanted to examine ways that SASFAA could support and strengthen diversity in correlation with the Long-Range Plan (LRP). With NASFAA's Diversity Leadership Program that was revealed in 2018 to help target underrepresented and marginalized groups, President Tulloss and the SLRP Committee wanted to investigate the possibility of creating a Diversity Leadership Program (DLP) on the regional level. To assist with this possibility, President Tulloss asked the SASFAA representative of the 2019-2020 NASFAA DLP class to craft a proposal for the SASFAA board to consider detailing how a similar program could work for SASFAA, as well as how members could apply and be selected. This program was approved in April 2021.

Goals:

DLP seeks to

- Provide opportunity, support, and access to individuals from identified underrepresented groups (i.e., people of color, people with disabilities, and people of LGBTQ+) in the Association community;
- Help to advance the careers of program participants through professional development;
- Increase access to a diverse pool of talented leaders who represent the diversity of the membership; and
- To create a collaboration that is transferable to help the institution, State Association, and SASFAA to develop future leaders, from diverse backgrounds, who are motivated to accomplish the goals of the Association.

Benefits:

If accepted, DLP participants would receive the following benefits:

- Complimentary registration to the SASFAA Annual Conference and a stipend (see chart below) to be used on hotel, meals, travel
- A One-On-One Partnership with a member who have previously served on SASFAA's Board of Directors and/or Committee(s); and
- Hold a place on one task force for each participant to ensure volunteer experience is gained.

Eligibility:

To be considered for the DLP, a candidate must:

- Be a member of a racial or ethnic minority group, LGBTQ+, or a person with a disability;

- Have been working in or with financial aid for a minimum of three years (no maximum);
- Be a member of SASFAA;
- Have demonstrated professional or civic/community leadership experience;
- Be committed to fully engage in all DLP scholarship benefits as outlined above;
- Secure in writing supervisor/institutional support for the individual's participation and time away from the office to participate in DLP; and
- Be employed by a current SASFAA member.

Informal Mentoring

Outside of formal programs, informal mentorship can play an important role in building a diverse volunteer and leadership pipeline in SASFAA. Relationships often develop at conferences or through association work.

SASFAA's Informal Programs through Workshops

SASFAA has a long history of offering training conferences, workshops, and symposiums to assist our members in leadership development. Presenters/teachers/leaders at these events often connect with attendees and develop life-long relationships with mutual support and encouragement. The newest members to SASFAA typically attend the New Aid Officer Workshop and benefit the most from mentor/mentee informal type relationships. Other training events, however, offer opportunities for connections between aid administrators.

SASFAA New Aid Officer Workshop (NAOW)

The SASFAA New Aid Officer Workshop (NAOW) is one of the premier workshops being offered to new financial aid administrators. The weeklong training is typically offered on a college campus where participants stay on campus in residence halls/apartments, eat in college/university dining and really immerse themselves in the entire experience, and is offered annually.

Purpose

The SASFAA Summer Workshop is an intense professional development activity designed to provide a working knowledge of the federal financial aid programs, as well as an understanding of the laws and regulations that govern these programs. The curriculum will take the student from A - Z through the basics of financial aid.

Intended Audience

The workshop is intended for new financial aid administrators with less than five years of experience in the field of financial aid. Other individuals whose professional responsibilities include significant contact with the financial aid process are welcome to attend the workshop on a space-available basis.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, will conduct the class sessions. The instructors will teach in teams of two and work with the same class of participants throughout the week. Lectures, interactive instruction and case studies will be used throughout the week. The faculty will be on site for the entire week, providing opportunities for ample interaction outside the classroom.

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Relationships develop between the attendees and the faculty and staff. Contact information is shared, and we often hear stories of how connections are formed for life. One former faculty member stated, "One of my attendees

finds me at every SASFAA, NASFAA, FSA Conference, and takes a picture with me. She reaches out to let me know her accomplishments and asks questions when needed. This has gone on for years!”

SASFAA Pre-Conference New Aid Workshop

In the past, there has been a new member pre-conference workshop which can serve to provide participants with an idea of the training they will receive at the NAOW. This training is known throughout the country as a premier training event, and in many years, participants have not only come from the SASFAA region. Throughout the workshop participants can and will find out how to become more involved with SASFAA as they grow in the position and this profession.

Intended Audience

The workshop is intended for new financial aid administrators with less than five years of experience in the field of financial aid. Other individuals whose professional responsibilities include significant contact with the financial aid process are welcome to attend the workshop on a space-available basis.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, will conduct the workshop sessions. The day-long event typically takes place before the Annual Conference.

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Attendees at the pre-conference workshop are encouraged to stay connected with this group and the instructors through the Conference. After the Conference, attendees are contacted, and can develop relationships with others – both newer and seasoned members.

SASFAA Leadership Symposium

Offered every other year, the SASFAA Leadership symposium is geared towards people who are currently in leadership positions, as well as those striving to be in a position of leadership. This interactive symposium provides attendees with the tools necessary to take their skills to the next level. Attendees hope to better themselves to be effective leaders within a financial aid office, financial aid association, or other office.

Attendees may not necessarily be new members. The Symposium is sometimes offered at a conference as a pre-conference workshop, and other times as a stand-alone event. Many SASFAA members who are currently in serving in various positions in state, regional and national associations have participated in a Leadership Symposium at some point during their career.

Intended Audience

The workshop is intended for current and future leaders in SASFAA and the nine state associations.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, conduct the workshop sessions. The event is at a conference as a day-long workshop, but also has been offered as a stand-alone workshop that lasts several days, with assignments beforehand.

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Relationships develop between the attendees and the faculty and staff. Contact information is shared and attendees are encouraged to become leaders in their associations.

SASFAA Mid-Level Workshop

Offered every few years, the SASFAA Mid-Level Workshop is geared towards aid administrators who are in middle levels of leadership like assistant or associate director. This interactive event provides attendees with the tools necessary to take their skills to the next level. Attendees hope to better themselves to be effective leaders within a financial aid office, financial aid association, or other office.

Attendees may not necessarily be new members. The workshop is sometimes offered at a conference as a pre-conference workshop, and other times as a stand-alone event.

Intended Audience

The workshop is intended for associate and assistant directors in financial aid offices at institutions across SASFAA.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, conduct the workshop sessions. The event has been offered as a stand-alone workshop that lasts several days, but also could be offered as a pre-conference event which lasts one day (several hours).

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Relationships develop between the attendees and the faculty and staff. Contact information is shared and attendees are encouraged to become leaders in their associations.

SASFAA Management Institute

Offered every few years, the SASFAA Management Institute is geared towards aid administrators who are in management levels of leadership. This interactive event provides attendees with the tools necessary to take their skills to the next level. Attendees hope to better themselves to be effective leaders within a financial aid office, financial aid association, or other office.

Intended Audience

The workshop is intended for professionals who manage others in financial aid offices at institutions across SASFAA.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, conduct the workshop sessions. The event is typically a several day-long event.

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Relationships develop between the attendees and the faculty and staff. Contact information is shared and attendees are encouraged to become leaders in their associations.

SASFAA Directors Summit

The SASFAA Directors Summit is a newer event offered in the SASFAA region. The event brings together chief financial aid directors for high-level discussions. Attendees hope to become better directors in their aid offices.

Intended Audience

The workshop is intended for directors in financial aid offices at institutions across SASFAA.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, conduct the workshop sessions, which were presented virtually. The event is typically a several day-long event.

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Even virtually, relationships develop between the attendees and the faculty and staff. Contact information is shared and attendees are encouraged to become leaders in their associations.

SASFAA Enrollment Management Forum

The SASFAA Enrollment Management (EM) forum is a newer event offered in the SASFAA region. The event brings together aid professionals who wish to learn more about EM and where financial aid fits into the EM puzzle.

Intended Audience

This workshop brings together aid professionals that desire to know more about the history and inter-workings of EM.

Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, conduct the workshop sessions, which were presented virtually. The event is typically a several day-long event, spread out over approximately a month.

Mentoring Opportunities

Attendees find out how to become more involved within SASFAA and their states. Even virtually, relationships develop between the attendees and the faculty and staff. Contact information is shared and attendees are encouraged to become leaders in their associations.

SASFAA's Informal Programs through Committee Service and SASFAA Leadership

SASFAA depends on service from its membership. SASFAA's standing, discretionary, and ad hoc committees are vital to association operations, and they are also excellent means on informal mentoring. Volunteering as a committee member affords new members an opportunity to meet other SASFAA members and to learn how the association operates. In most cases, experienced SASFAA members chair committees. Through the committee chair-committee member relationship, informal mentorship opportunities may form. Experienced committee members may also provide informal mentorship opportunities to new committee members. Committee work is a first step to taking on more responsibility in the leadership of SASFAA, and committee chairs often identify future committee leaders for future boards.

Committee chairs may in turn, form informal mentoring relationships with elected executive board members. Learning from current and past elected board members is a great way to grow your knowledge of SASFAA and potentially determine that you may want to run for an elected position in the future.

Mentoring Resources

[SASFAA Governing Documents](#) – learn about association operations and opportunities for involvement

SASFAA Committees

- Awards
- Budget and Finance
- Business Partners
- Bylaws
- Communications and Outreach
- Conference
- Electronic Services
- Global Issues
- Governance and planning
- Legislative Relations
- Long Range Planning
- Membership
- Nominations and Elections
- Site Selection
- Sponsorship

[American Society of Association Executives](#) – general information on association leadership with mentorship guidance

NASFAA provides information about mentoring on its website.

https://www.nasfaa.org/creating_an_effective_mentorship_program