

Advisor

Program Guide

INTRODUCTION

TO THE ADVISOR:

Thank you for agreeing to serve as an advisor for the San Francisco Hispanic Affairs Advisory Council (HAAC) Advisor Program). As an advisor, you are about to begin one of life’s most rewarding experiences. Your commitment shows you believe in others.

By providing guidance throughout the program, you play a vital role in the development of the participant. You will provide a support system that ensures the participant stays focused through the duration of the program and assists them in moving closer to accomplishing their identified career goals. You will also share your organizational knowledge with the program participant.

This guide is designed to assist HAAC advisors and participants in understanding their role in the program. If you would like more detailed information about the program, you may contact the Advisor Program coordinator.

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| PROGRAM  DESCRIPTION | Initiated in 2005, the San Francisco Hispanic Affairs Advisor Council (HAAC) Advisory Program is a 10-month program designed for HAAC members to work one-on-one with an Advisor to develop a HAAC Development Plan/Individual Development Plan (HDP/IDP) and help them chart a path to develop the knowledge, skills, and abilities to be successful in their careers. The Advisors are volunteers with years of experience in SSA and are committed to working with the participants to ensure a bright future for HAAC members in our Agency. |
| REQUIREMENTS TO PARTICIPATE | To participate in the Advisory Program as a mentee you must be a HAAC member in good standing. In addition, you must have completed your probationary period and successfully reached your journeyman status.  If you meet the eligibility requirements, you must submit a [participant application](#appendixA) and a [supervisor/manager evaluation](#appendixB) form by the deadline indicated on the [timeline](#programtimeline). (***Appendix A and B)*** |
| ADVISOR PROGRAM REQUIREMENTS | To successfully complete the Advisor Program, participants must complete the following program requirements:   * Participate in all conference calls * Complete the HDP/IDP * Complete one career activity * Complete one cultural activity * Read suggested readings |
| **ADVISOR/MENTOR RESPONSIBILITIES** | Pairing employees with experienced professionals for career development plays an important role in the Advisory Program. A mentor facilitates personal and professional growth in an employee by sharing the knowledge and insights they have acquired throughout the years.  In your role as a mentor, you will assist in developing the HDP/IDP and considering the actual developmental activities and requirements to be completed during the program. As needed, you will conduct periodic discussions with the participant(s) and provide general advice and guidance on program issues. The frequency of your discussions may vary, depending on the participant’s needs; however, monthly discussions are recommended. As a mentor, you have a variety of responsibilities, including the following: **Counseling/Advising**  * Coaches participant in ways to enhance skills and intellectual development; * Links the participant with others who can enhance the participant's learning; * Advises the participant on how to overcome real or perceived roadblocks; * Provides candid feedback to the participant about perceived strengths and developmental needs and assists in the planning and development of the HDP/IDP; * Discusses existing strengths and developmental needs of the participant with the supervisor of record, as needed, and refers to the supervisor/manager’s evaluation form; * Consults regularly with the participant to provide general counseling on any work-related issues the participant may have; * Serves as an advocate for the participant to work through program-related problems; * Serves as a role model by providing examples of professionalism and integrity;  **Monitoring**  * Discusses progress toward meeting program objectives; and * Discusses outcomes of developmental assignments. |
| **THE MENTORING RELATIONSHIP** | Mentors serve as role models to the participants in terms of values, ethics, and professional practices. As a mentor, you should take a genuine interest in the participant, helping them overcome the pressures of transitioning to positions with increased responsibility and provide constructive feedback on the participant’s leadership development.  Mentoring is a one-on-one process that requires the mentor and participant to enter into a mutually supportive relationship. The relationship requires honesty, mutual trust, respect, openness and a willingness by both parties to take risks and attempt new behaviors. ***Appendix E*** provides a summary of the roles of the mentor and participant in the mentoring relationship.  In a successful mentoring relationship, the participant should develop a bond with the mentor. Although you have a busy schedule, you should be willing to set aside time for discussions with the participant about their progress in the program.  At the beginning of the program, you and the participant should come to an agreement upon the parameters of your relationship. You will set boundaries on which topics can be discussed and how you will handle sensitive issues. These ground rules form an important foundation for your relationship. You should also determine the frequency and type of meetings; i.e., a one- hour meeting each month, unlimited phone calls, etc. Your meetings do not have to be face-to-face. Discussions with the participant may be via telephone.  You should expect the relationship to develop over the course of the program and not be surprised if that relationship continues beyond the end of the program. However, there may be times when the mentoring relationship may not work out. By serving as a mentor, you are making a commitment to be personally involved in helping another employee to achieve his or her career goals. The program participant will benefit from your knowledge and experiences and gain a greater knowledge of the organization. Mentoring can also be beneficial to you because it can provide a sense of satisfaction from helping someone else in his/her quest for leadership. |
| **PARTICIPANT/ MENTEE RESPONSIBILITIES** | Participants are given the opportunity to work with an Advisor that is an experienced professional on career development. This plays an important role in the mentee’s success. It is important that mentees utilize the advisor’s personal and professional experience for development.  Although advisors will assist mentees in developing the HDP/IDP and completion of all program requirements, it is the mentee’s responsibility to ensure that all requirements be completed according to the program timeline.  The advisor and the mentee will decide how often they will meet, however, monthly discussions are recommended. As a mentee you have a variety of responsibilities, including the following:   * Ask for advice and welcome constructive criticism * Be considerate of your advisor’s time * Listen to what your advisor has to say * Have an open and honest communication * Complete all assignments according to the program timeline, (i.e., developing HDP/IDP, completing the career and cultural assignments) |
| **DEVELOPING THE HDP/IDP** | The purpose of the HDP/IDP is to identify specific developmental opportunities which may be completed during the program year and throughout participant’s career, and which in turn will expand the work experience and knowledge base of the participant.  We also encourage you to review the Individual Development Plan Handbook found on the [Office of Learning](ftp://training.ba.ssa.gov/Public/CareerDevelopment/IDP%20Handbook) website. |
| **CAREER ACTIVITY** | Mentees are responsible for completing a self-assessment and one career activity. To fulfill the career activity mentees must read a book or complete a course. Mentees can use the self-assessment tools offered by the Office of Learning.  There are many online resources that offer online courses and books, including the following:   * [Office of Learning](http://learning.ba.ssa.gov/ol/default.asp); * [Self-assessment](http://learning.ba.ssa.gov/OL/competencies/) - in the Office of Learning; * [Safari Books](http://techbus.safaribooksonline.com/?uicode=ssa) (Mobile app avail) * [SSALMS](https://sso.ba.ssa.gov/acu/LMS)- offers limited online courses * [OPM Career Development](http://ssahost.ba.ssa.gov/ope/ces/career/doctor.htm) |
| **CULTURAL ACTIVITY** | Mentees are responsible for participating in one cultural event. Examples of acceptable events could be, attending a Latin Film Festival, Hispanic Youth Symposium, Museum Exhibition of Hispanic Artists, or volunteer as a tutor in your community.    Links to possible events:  [League of United Latin American Citizens](http://lulac.org/)  [Central California Hispanic Chamber of Commerce](http://www.cchcc.net/events.html)  [California Hispanic Chamber of Commerce](http://www.cahcc.com/)  [Arizona Hispanic Chamber of Commerce](http://www.azhcc.com/)  [Northern Nevada Hispanic Chamber of Commerce](http://www.sparkschamber.org) |
| **PROGRAM TIMELINE** | |  |  | | --- | --- | | January | * Message to all HAAC members is released to announce the coming year Advisory Program * Mentee’s/Advisor’s application due | | February | * Review applications * Select mentees and advisors * Announcement of mentees and advisors | | March | * Kick-off orientation conference call for participants and advisors. Call includes HDP/IDP Training (provided by ETDT). During this conference call participants will gain a better understanding of what the HDP/IDP entails and how to develop their individual goals * Participant’s [self-assessment](http://learning.ba.ssa.gov/OL/competencies/) due | | April | * HDP/IDP due | | June | * SSA 45 due * Second conference call for all participants and advisors. During this conference call a Regional Executive/Special Guest is invited to participate and discuss leadership topic | | August | * Career activity summary due. Mentees will be asked to provide a write up of their career activity. | | September | * Third Conference Call | | October | * Cultural Activity due | | November | * Mentee’s [final assessment](http://learning.ba.ssa.gov/OL/competencies/) due | | December | * End of year conference call for mentees and advisors. Final assignments and program success stories are shared |   Timeline is subject to change |

**APPENDIX A**



# HAAC ADVISOR PROGRAM Participant Application

# Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Current Position and Grade: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office/ Office Code: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Office Address: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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Office Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office Fax Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What are your personal and professional goals?

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List the areas of knowledge, skills, and abilities in which you would like help from your advisor?

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What are your cultural, creative, and social interests?

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**Signature Date**

**Please return completed applications electronically** **to** [**Wanda.Gonzales@ssa.gov and Maria.Ballon@ssa.gov**](mailto:wanda.gonzales@ssa.gov;%20maria.ballon@ssa.gov?subject=Advisor%20Program%20Participant%20Application)

**APPENDIX B**

**Supervisor/Manager**

**Evaluation of SF HAAC Mentee (Participant)**

|  |  |
| --- | --- |
| **Participants Name:** | **Title:** |
| **Office/Dept:** | **Date of Evaluation:** |
| **Supervisor/Manager Name:** | **Phone Number:** |

**Please evaluate all factors indicated below by checking the appropriate space and commenting where applicable.**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Question** | **Excellent** | **Good** | **Needs Impro-vement** | **Comments** |
| Time and attendance |  |  |  |  |
| Attitude/Interpersonal skills |  |  |  |  |
| Rapport with management |  |  |  |  |
| Job Knowledge |  |  |  |  |
| Participation |  |  |  |  |
| Willingness to take on special projects |  |  |  |  |
| How does mentee take constructive feedback? |  |  |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Question** | **Yes** | **No** | **Comments** |
| Does employee need to improve? (provide comments) |  |  |  |
| Is there a workload the office needs assistance with? For example, e-services, overpayments, offset, etc. For a possible project? |  |  |  |
| Is there a major accomplishment that the employee has achieved? |  |  |  |
| Is the employee the “go to person” in the office? |  |  |  |
| Does the employee “dress for success”? |  |  |  |
| Is the employee a team player? |  |  |  |

Provide employee’s strengths:

Areas for development:

Additional Comments:

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**APPENDIX C**

HAAC ADVISOR PROGRAM

Advisor Application

# Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Current Position and Grade: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Office Address: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Office Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Office Fax Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What jobs have you held that will help you as an advisor?

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List your areas of expertise and special work related interests (e.g. computers, making speeches, public affairs, community outreach, etc.).

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What are your cultural, creative, and social interests?

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

**Please return completed applications electronically to** [**Wanda.Gonzales@ssa.gov and Maria.Ballon@ssa.gov**](mailto:wanda.gonzales@ssa.gov;%20maria.ballon@ssa.gov?subject=Advisor%20Program%20Advisor%20Application)

**APPENDIX D**



## HAAC Advisor and Participant Agreement Form

We have mutually agreed to enter into an Advisor/Participant relationship that we expect to benefit both of us. We want this to be a truly enjoyable, rich, and rewarding experience with most of our time together spent in substantive development activities.

To ensure that we have a mutual understanding of our expectations, we have noted these features of our relationship:

* **Confidentiality:** *Keep confidence as appropriate and/or requested by the participant and/or Advisor.*
* **Frequency and Type of Meetings & Communications**

(Telephone, visits, e-mail; minimum frequency expected)*:   
Schedule communication every other month or more often as needed. Face-to-face meetings are preferred if possible. Email and unscheduled telephone calls as needed.*

## Advisor Responsibilities

* **Approximate amount of time to be invested by Advisor** *(per month):   
  Advisor will invest at least one hour or as much time as necessary bi-monthly, quarterly conference calls with coordinator. Advisor will use the time to communicate with the Participant.*

* **Specific role of the Advisor**  
  Model, guide, give feedback, recommends developmental activities, assist in goal setting HAAC Development Plan/Individual Development Plan (HDP/IDP), suggest/provide resources, and invite to meetings. Advisor is committed to open and honest communication working with the Participant.

## Participant Responsibilities

* **Specific requirements for Participant**  
  W*illingness to accept responsibility for own growth, receptive to feedback and new ideas, readiness to seek change and risk-taking, comfortable sharing ideas, and* ***completion of at least one career development activity, one cultural activity***, ***and a Fred Pryor course.***
* **Career Development Component**:   
  Participant recognizes that this program will provide opportunities for skills enhancement*.* ***Participant will take initiative to gain as much benefit from this program as possible and develop a HDP/IDP and/or complete one career-related course through any SSA resources.*** *Advisor will take initiative to recommend other or additional opportunities, which may be beneficial to participant.*
* **Cultural Component:**   
  Participant recognizes the value of Hispanic culture and agrees to participate in at least one cultural activity *(i.e. attend a Latin Film Festival, Museum Exhibition of Hispanic Artists, or volunteer as a tutor for at risk children). Area VP will solicit ideas and coordinate events based on geographical location.*

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We have discussed the Advisor experience and its meaning within the context of SF-HAAC’s Agreement.

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We have reviewed and understand the roles and responsibilities of the Advisor and Participant Program guidelines.

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The knowledge, skills, and abilities that are to be the focus of the Participant’s career developmental efforts are to be noted on the HDP/IDP. The participant in collaboration with the Advisor will develop the HDP/IDP.

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We expect the duration of the Advisor relationship to be one calendar year. However, we further agree to a *no-fault* conclusion of this relationship if, for any reason, it seems appropriate.

*Participant Signature****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *Date* ***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

*Advisor Signature****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *Date* ***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

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**APPENDIX E**

##### **Mentoring Relationship Summary**

##### **The Mentor’s Role**

* Represent the organization’s vision, mission and values in a variety of situations;
* Provide a big picture of the organization and career opportunities;
* Provide advice on the organizational culture;
* Identify any of mentee’s behaviors that may be perceived negatively;
* Serve as a confidant. Listen to mentee’s concerns and respond appropriately;
* Be candid in offering information and advice;
* Be supportive. Suggest ways to overcome work pressures, problems and conflict;
* Provide constructive feedback, yet build confidence; and
* Challenge your mentee to take risks, assume initiative, and try new ideas.

# Program Participant’s Role

* Take an active role in the mentoring relationship;
* Think about skills you would like to develop and your long-range plans; communicate these to your mentor;
* Prepare for meetings with your mentor;
* Observe your mentor’s work and communication styles;
* Observe the organizational culture, political environment and leadership styles;
* Be open to change and transition to exploring new possibilities;
* Look for challenges and be willing to take risks; and
* Focus on the leadership competencies and the program requirements.
* Have open and honest communication

**APPENDIX F**

# 

# HAAC ADVISOR PROGRAM

# Individual Development Plan

|  |  |
| --- | --- |
| *Name (Last, First, Middle)* | *Position Title* |
| *Pay Plan-Grade-Series* | *Work Location* |
| *Home Organization (Office, Component)* |  |

**Short-Range Career Goal***(Attainable in 1-2 years):*



**Long-Range Career Goal** *(Attainable in 4-6 years):*



**Self-Assessment:**

Developmental Objectives:*What additional knowledge, skills and abilities, related to your short and long-term career interests do you need to work on during this HAAC program*? Identify 3-5 specific objectives:



**Developmental Experiences:**

##### *List experiences/assignments (including the cultural activity)/training you believe will meet your developmental objectives. Include assignments (both in and out of work), details, special projects, formal classes, and OJT, reading, etc.)*

*Participant Signature****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *Date* ***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

*Advisor Signature****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *Date* ***\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

**Please return completed applications electronically to** [**Wanda.Gonzales@ssa.gov and Maria.Ballon@ssa.gov**](mailto:wanda.gonzales@ssa.gov;%20maria.ballon@ssa.gov?subject=Advisor%20Program%20IDP%20(HDP))