Veterans Working Group Meeting

Wednesday, June 26, 2019
WELCOME AND REVIEW OF AGENDA

David Hiller
Robert R. McCormick Foundation
Meeting Overview

Welcome and Review of Agenda
David Hiller, Robert R. McCormick Foundation

Lightning Round
Veterans Working Group Introductions and 1.1.1

Remarks from Illinois Joining Forces
Brig. Gen. (Ret.) Stephen Curda, Ph.D., Executive Director

Presentations

Panel Introduction
Dallas Kratzer, Council for Adult and Experiential Learning

Panel: Veteran Mentoring Programs
Moderator – Dallas Kratzer, Council for Adult and Experiential Learning
Juanita Hardin and Todd Siau, BMO Harris Bank
Mel Parks, PwC
Ron Burke and Tiffany Kehr, Abbott Laboratories

Table Talk Discussion
Dallas Kratzer, Council for Adult and Experiential Learning

Wrap Up and Meeting Evaluation
David Hiller, Robert R. McCormick Foundation

Networking and Lunch
Hilary Holbrook, Commercial Club of Chicago
LIGHTNING ROUND
REMARKS FROM ILLINOIS JOINING FORCES

Brig. Gen. (Ret.) Stephen Curda, Ph.D., Executive Director
ILLINOIS JOIN FORCES: THE WAY AHEAD

BRIG. GEN. (RET) STEPHEN K. CURDA, PH.D., EXECUTIVE DIRECTOR

- Illinois Joining Forces serves as a statewide public-private partnership that promotes the efficient delivery of Growth and Wellness initiatives for Service Members, Veterans, and their Families at the community level throughout the State of Illinois.
Working Groups Model

Veteran Support Community Model
Veteran Support Communities

- Services are best delivered closest to home
- Connects individuals to local resources and services they need, when they need them
- Run by the community members
- IJF serves in a supporting role

SUCCESS ATTRIBUTES
- Central Hub Organization
- Convening Authority
- Core Partners
- Referral Platform
- Peer Support Capacity
- Corporate/Private Sponsorship

- Housing
- Employment
- Financial Assistance
- Medical
- Education
- Women Veterans

[Map of Illinois highlighting various locations]
Women Veteran Ambassadors

- Promotes and advocates for women veterans’ issues within their communities
- Recommends new policies and legislative priorities related to women veterans
- Provides peer support to fellow women veterans
- Key component of the Veteran Support Community

Women veterans are an under-represented and under-resourced segment of the veteran population. The Women’s Ambassador Program identifies highly-skilled women veterans who want to make Illinois the most beneficial state for their sisters-in-arms to live and thrive in.
Care Coordination Center

- Processes assistance requests from anywhere in the state
- Serves as a single point-of-entry for all needs
- Connects individuals to core partners and Women Veterans Ambassadors in their community
- Maintains and analyzes data from assistance requests to gauge trends

In partnership with

CALL 833-INFO-IJF FOR ASSISTANCE, OR VISIT ILLINOISJOININGFORCES.ORG
“Illinois Joining Forces - from beginning of service to end of watch, we are here for all.”

Brig. Gen. (Ret) Stephen K. Curda
Executive Director
Illinois Joining Forces
skcurda@illinoisjoiningforces.org
312-380-5250
PANEL:
VETERAN MENTORING PROGRAMS

Moderator: Dallas Kratzer, Council for Adult and Experiential Learning
VAC Peer to Peer Mentor Program
Why Military Veteran representation matters to BMO...

- **Our Vision**: Ensures that BMO is positioned to compete by identifying top talent in the labor market to better support the needs of our customers.

- **Our Values**: Supports the culture and values of BMO by attracting fresh diverse perspectives and experiences to the organization.

- **Brand**: Gain insights on products and services that best supports the needs of our military veteran customers through our employees in a human, intuitive and one bank approach.

- **Actions**: Clear alignment to BMO’s actions that are consistent with the values of Military Veterans.

- **Outcome**: Leading company in military veteran recruitment, engagement and promotion that is aligned with the US government hiring benchmark.
Tools & Resources for Mentors & Mentees

Mentoring Agreement

A mentoring agreement can help to establish the terms of your mentoring relationship and hold both the mentor and the mentee accountable. Remember to review the following tips for success in a mentoring relationship:

- Ensure the partnership is mentor-driven
- Face-to-face partnerships
- Set ground rules
- For more detail on the tips to success in mentoring, visit the Mentoring page on the HR portal.

**Keys to Success**

**Mentee Name**

**Mentor Name**

**Relationship Timing**

<table>
<thead>
<tr>
<th>When will the mentoring relationship begin?</th>
<th>How often will we meet?</th>
<th>What will the relationship end?</th>
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<tbody>
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</table>

As a mentor, I agree to:

1. (example: keep in touch and communicate with my mentee)
2. (example: provide feedback and constructive feedback to my mentee)

As a mentee, I agree to:

1. (example: keep in touch and communicate with my mentor)
2. (example: provide feedback and constructive feedback to my mentor)

**As a partnership, we agree to the following objectives and outcomes as a result of this relationship:**

1. (example: increase knowledge and skills)
2. (example: develop a professional network)
3. (example: enhance communication skills)

**Mentee Signature**

**Mentor Signature**

**Date**

**Date**

Quick Tips

Whether formal or informal, a mentoring program provides a unique opportunity to learn and grow. Being honest and proactive are both critical to a successful partnership. Some tips for a Successful Mentoring Relationship are listed below – You can find additional tips and useful references in your Veterans Mentor Packet.

**First Meeting Tips**

- Be prepared to discuss your professional background, current role, and your career aspirations.
- Discuss the Ground Rules for communication.
- Clearly and agree on the partnership as your mentee.
- Agree to support and guide each other.

**Conversation Starters**

- What has gotten you to where you are today – professionally and personally?
- What are your goals for the future?
- What are your strengths and weaknesses?
Quick Tips for Mentors

Your role as a mentor is important because you are in a position to provide critical guidance which can have significant influence over their career and development.

Some tips for a Successful Mentoring Relationship are listed below – You can find additional tips and useful references in your Veterans Mentor Packet.

### Keys to Success

<table>
<thead>
<tr>
<th>Keys to Success</th>
<th>Tips for Mentors</th>
<th>FIRST MEETING TIPS</th>
<th>CONVERSATION STARTERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ensure the partnership is mentee-driven</td>
<td>Be honest</td>
<td>Be prepared to discuss your professional background, current role and your own career aspirations</td>
<td>What has gotten you to where you are today – professionally and personally?</td>
</tr>
<tr>
<td>Face-to-face partnerships</td>
<td>Be open to feedback</td>
<td>Set the Ground Rules – the VMP Mentoring Agreement can be a useful resource to assist you in this</td>
<td>What are your professional, and personal, objectives?</td>
</tr>
<tr>
<td>Set ground rules</td>
<td>Keep an active and open dialogue</td>
<td>Agree what you would mutually like to achieve from the partnership</td>
<td>What are some of your strengths that you would like to build on? Development areas that you would like to improve?</td>
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</table>

Will Felder, Capital Markets and Major (USAR), has volunteered to support mentors/mentees with any questions related to Bank policies and procedures for those serving in the Guard or Reserves.

<table>
<thead>
<tr>
<th>Know what success means</th>
<th>Consider facilitating networking and relationship building through your network</th>
<th>Clarify and agree roles and responsibilities</th>
<th>How would you prefer to communicate and work together?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree to the mentorship</td>
<td>Provide guidance and advice</td>
<td></td>
<td>What does success look like to you, for this partnership?</td>
</tr>
<tr>
<td>Think about a great mentor you have had</td>
<td>Reflect on the successes of that partnership</td>
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</tbody>
</table>
Quick Tips for Mentees

Whether, formal or informal, a mentoring program provides a unique opportunity to learn and grow. Being honest and proactive are both critical to a successful partnership. Some tips for a Successful Mentoring Relationship are listed below – You can find additional tips and useful references in your Veterans Mentor Packet.

**KEYS TO A SUCCESSFUL PARTNERSHIP**
- Ensure the partnership is mentee-driven
- Hold each other accountable
- Face-to-face partnerships
- Know what success means
- Set ground rules

**TIPS FOR MENTEES**
- Take the initiative!
- Be open to feedback
- Be clear about your objectives and establish ground rules
- Keep an active and open dialogue
- Maintain confidentiality
- Be open and know that it is okay to ask for advice or guidance
- Know that even a 15 minute touch point can be a great opportunity for a connection
- Do not judge

**FIRST MEETING TIPS**
- Be prepared to discuss your professional background, current role and your career aspirations
- Discuss the Ground Rules for Meetings – the VMP Mentoring Agreement can assist you with this
- Agree what you would mutually like to achieve from the partnership
- Clarify and agree roles and responsibilities
- Make sure you set the date/time of your next meeting

**CONVERSATION STARTERS**
- What has gotten you to where you are today – professionally and personally?
- Have you had successful mentoring relationships in the past, or currently?
- Has there been a pivotal moment in your career that you feel was particularly important in contributing to success?
- How would you prefer to communicate and work together?
## Monthly Touchpoint – Subjects for Consideration

<table>
<thead>
<tr>
<th>Month</th>
<th>Topic</th>
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<tbody>
<tr>
<td>December</td>
<td>Introductions</td>
</tr>
<tr>
<td>January</td>
<td>Recognition at BMO – BMO BEAM &amp; Spotlight Award</td>
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<tr>
<td>February</td>
<td>Networking At BMO</td>
</tr>
<tr>
<td>March</td>
<td>Building Your Talent Profile</td>
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<tr>
<td>April</td>
<td>Understanding Your Pay &amp; Benefits</td>
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<tr>
<td>May</td>
<td>BMO Pulse Survey</td>
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<tr>
<td>June</td>
<td>Thinking about your Mid-Year Assessment</td>
</tr>
<tr>
<td>July</td>
<td>Volunteering At BMO – Inside &amp; Outside the VAC</td>
</tr>
<tr>
<td>August</td>
<td>Managing Work-Life-Balance at BMO</td>
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<tr>
<td>September</td>
<td>Career Planning</td>
</tr>
<tr>
<td>October</td>
<td>Writing a Good Self Assessment</td>
</tr>
<tr>
<td>November</td>
<td>Developing Impactful Goals</td>
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</table>
Helpful Links…

VAC Website:
https://intranet.bmogc.net/enterprise/ourresponsibility/DiversityInclusion/VAC/Pages/default.aspx

Diversity and Inclusion Website: https://intranet.bmogc.net/enterprise/ourresponsibility/diversityinclusion

BMO U (Veterans Group):
https://degreed.com/learning#/browse?type=groups

BMO Employee Benefits:
VAN Mentoring Program
# VAN Mentoring Program

## Mission and Intent

**Mission:** To establish an individualized and flexible environment/program wherein individuals’ knowledge, skills, and experiences are shared.

**Intent:** To provide PwC military veterans an opportunity to create an impactful relationship with fellow PwC professionals and to be formally mentored by those more senior and experienced PwC colleagues on matters of personal and professional development. Participation in this program will lead to improved leadership, interpersonal, and technical skills for both mentors and mentees as well as facilitate effective transitions into PwC.

## Mentor Role/Responsibilities

**Role:** To oversee and assist PwC military veterans in their professional and personal development, as well as their transition from the military to PwC.

**Responsibilities:**
- Inspire, motivate, challenge and help your mentee create a future vision
- Be an active listener—mentees need to be clearly heard and understood
- Share similar experiences—help mentees embrace challenges by sharing
- Provide corrective feedback in an encouraging manner
- Speak of their mentee in positive or neutral ways

## Mentee Role/Responsibilities

**Role:** Recognize the responsibilities of self-development and the need for guidance and support from a more experienced person.

**Responsibilities:**
- Understand their needs
- Set their goals
- Convey their needs and goals to their mentor
- Discuss how they can accomplish their goals
- Write a summary to form new action items

## Mentor is not a...

**Coach:** Coaches provide ongoing support and guidance to assigned individuals to facilitate the growth and success of coachees specific to the PwC Professional Coaching & Development Program.

**Relationship Leader:** Relationship Leaders meet with assigned individuals to develop meaningful relationships that focus on the whole person throughout their career (discuss inspirational goals and build long-term relationships).

**Engagement Manager/Supervisor:** Engagement Managers/Supervisors directly oversee and direct the work of PwC staff.

## Join the Program

Access the mentoring application via this [link](#), then click the “Join Now” button and create a profile to be a mentee, mentor or both. In order to enroll as member of the VAN Mentorship Program you will need include the word “military” in the “About Me” section of your profile so you and other members can be identified via the “Quick Find” search tool to match.
MENTORING DEFINED

**Mentoring** is a tool for enhancing personal and professional growth through a developmental relationship between someone with experience or training in a certain area (the mentor) and a partner who wishes to learn from the mentor’s experience or training (the protégé).

The **Mentor** is an individual committed to serving as a role model or teacher for a protégé. Mentors may help protégés set goals and develop the skills, relationships and experiences to reach them.

The **Protégé** is someone who proactively seeks a relationship with a more experienced person in order to strengthen skills and build on current knowledge for personal and professional growth.
THE BUSINESS CASE FOR MENTORING

Mentoring supports the business by developing our people and promoting an engaging, inclusive environment that inspires innovation.

• Engages, nurtures and develops people by promoting practice, observation, questioning and exploration of ideas in a safe environment

• Promotes learning through the sharing of personal stories about experiences, successes and challenges – true for the mentor and the protégé

• Facilitates the transfer and retention of institutional knowledge and intellectual property

• Helps us attract, grow and retain the best talent

• Creates a more diverse and inclusive environment, enabling us to reflect and understand the customers and markets we serve
## ROLES AND RESPONSIBILITIES

There are three different roles in the mentoring program:

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibility</th>
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</table>
| **Protégé** | • Drives the process  
• Schedules meetings and creates agendas  
• Communicates developmental needs  
• Shares perspectives, perceptions and concerns  
• Maintains confidentiality and integrity of the partnership  
• Seeks and responds positively to mentor's feedback |
| **Mentor**  | • Shares knowledge and experience  
• Keeps the partnership a priority  
• Provides honest feedback and support  
• Serves as a resource for career development  
• Maintains confidentiality and integrity of the partnership |
| **Manager** | • Supports mentoring partnership  
• Maintains current managerial activities  
• Provides time and support for participants to commit to mentoring  
• Encourages participation in mentoring with his or her staff |
DO’S AND DON’TS OF MENTORING

These shared experiences of protégés and mentors help us to understand what positive (and not-so-positive) mentoring looks like:

**A Positive Mentoring Experience**
- Exhibit understanding/empathy
- View challenges as opportunities
- Be open to/cognizant of individual styles
- Give honest and sincere feedback
- Learn from others’ experiences
- Send agenda and be prepared for meetings
- Be open to and accepting of feedback
- Get engaged, ask questions and listen
- Maintain confidentiality

**A Less-Than-Positive Mentoring Experience**
- Have a condescending attitude
- See everything in black and white
- Be culturally insensitive
- Be impersonal in communicating
- Have a know-it-all attitude
- Be late or unprepared for meetings
- Be critical or overly directive with feedback
- Withhold helpful information or learnings from your experiences
- Disregard confidentiality
DISCUSSION:
EMPLOYER RECOGNITION PROGRAMS WITH REGARD TO VETERAN HIRING

*Moderator:* Dallas Kratzer, Council for Adult and Experiential Learning
TABLE TALK

*Moderator:* Dallas Kratzer, Council for Adult and Experiential Learning
WRAP UP AND MEETING EVALUATION

David Hiller
Robert R. McCormick Foundation
NETWORKING AND LUNCH

Hilary Holbrook
Commercial Club of Chicago