Mentoring Plan for Executive Director

(A mentoring plan can be developed based on each project and/or category that the new Executive Director will need to have a knowledge and understanding of. A start-up organization may have fewer categories and content areas, but ensure that all important areas are covered in your plan. Your organization's former Executive Director, Interim or Organizational Consultant then works through the mentoring plan with your new Executive Director. Customize the following plan to meet your organization's specific needs.)

PROJECT or CATEGORY	CONTENT AREA	LEARNING STRATEGIES	COMPLETED
Board	• Bylaws	1. Review Bylaws	
		2. Assess for sections that need revision	
		3. Focus on term limits & election of officers	
		4. Develop suggested revisions for work with Executive Committee	
Board	• ED/Board interaction	1. Review Board's role and responsibilities vs. Executive Director's role and responsibilities	
		2. Clarify governance vs. management	
		3. Review items that need Board approval	
		4. Review ED's relationship with Executive Committee	
		5. Review meeting structures for full Board and Executive Committee	
		6. Overview ED's responsibilities in preparing for Board meetings	
Board	• Board Member Enlistment	1. Review new Board member enlistment process	
		2. Review Prospective Board Member Application	
		3. Recommend any revisions	
		4. Present revisions to Executive Committee	
		5. Brainstorm names of potential Board Members	
Finances	• Budgets	1. Review draft current budget	
		2. Review steps of developing a budget	
		3. Review process of developing budget spreadsheets	
		4. Review current grants and contracts to	

		determine budgets	
		5. Develop a combined budget	
Finances	• Financial Statements	1. Review quarterly financial statements	
		2. Work with Accountant (or bookkeeper) to review financial statements	
		3. Review cash forecast	
		4. Review cost by location	
Finances	• Grant Writing	1. Review grant writing research	
		2. Review grant writing process; how to respond to a Request for Proposal (RFP) or Request for Application (RFA)	
		3. Review Foundation List for potential funders	
		4. Develop a draft funding request to an appropriate foundation	
		5. Watch for Grant Writing Workshop that you can enroll in	
Program Development	• Program Development	1. Review structure, goals, activities, and outcomes of a current program.	
		2. Review most recent community needs assessment.	
		3. Identify one gap from needs assessment that relates to your organization's mission.	
		4. Draft a brief summary of how your organization could address that gap/need.	
		5. Develop a goal and related activities to address the identified gap/need.	
		6. Develop a budget to support the planned program activities.	
Grants And Contracts	• Funding Summary	1. Review grant and contract summary for current year	
Grants And Contracts	• Advocacy Grant	1. Review your organization's application	
		2. Review Statement of Work	
		3. Identify contract deliverables	
		4. Brainstorm how to establish a Parent Advisory Group	
		5. Review budget and invoicing process	
		6. Review how to run data reports for invoice	
Grants And Contracts	• Statewide Family Network	1. Review grant application	
		2. Identify contract deliverables (goals,	

		objectives, activities)	
		3. Develop plan for implementation of National CLAS Standards as outlined in application	
		4. Review budget, invoicing process and budget revision process	
		5. Review how to run data reports for TRAC data system	
		6. Review how to enter data into TRAC	
		7. Review Annual/Final Report process	
Grants And Contracts	• Family to Family	1. Review grant application/proposal	
		2. Identify contract deliverables	
		3. Review and discuss data collection requirements and reports	
		4. Review process for bi-weekly Health Tips Newsletters through *Constant Contact*	
Grants And Contracts	• Care Management Entity	1. Review vendor contracts including scope of work	
		2. Review Business Associates Agreement	
		3. Review HIPAA guidelines	
		4. Identify areas of concern or challenge to implementation	
Grants And Contracts	• Medicaid Waiver	1. Review Children's Mental Health Waiver	
		2. Identify service roles provided through the Waiver	
		3. Review Medicaid Provider Manuel	
		4. Review invoicing procedure with Accountant (or bookkeeper)	
Data	• Data Collection Forms	1. Review different forms used for data collection	
		2. Identify any forms that are no longer needed to use and remove those from the server	
		3. Review process for developing and storing forms and authorization to revise forms	
		4. Review Client Intake to identify any needed revisions	
		5. Review Family/Youth Skills at Intake to identify any needed revisions	
		6. Review Family/Youth Feedback Forms to identify any needed revisions	
		7. Review Family/Youth Feedback process done with external evaluator	
Data	• Database	1. Review database and ease of navigation	

		2. Review process for making database revisions as you work with external evaluator	
		3. Review each form on the database and how it is used	
		4. Review process for running reports	
Data	• Data Reports	1. Identify data reports required for each grant or contract	
		2. Review quarterly outcome reports from external evaluator	
		3. Review process for transferring data from quarterly outcome reports and database to develop a Data Dashboard	
		4. Review process for developing an Annual Report	
Organizational	• Vision/Mission	1. Review current vision and mission and make any approved changes	
		2. Recommend any additional changes	
		3. Memorize vision and mission and be prepared to share with stakeholders in multiple settings	
Organizational	• Logic Model	1. Review organization's most recent Logic Model and process of developing it	
		2. Review materials on development of logic models	
		3. Update organization's Logic Model to reflect current operations	
Organizational	• Partners	1. Make a list of current partners; local, state & federal, including affiliates	
		2. Review org charts for partners and the State Agency system	
		3. Brainstorm how to expand or improve partnerships	
Online Tools	• Constant Contact	1. Review process for developing materials on *Constant Contact* and how to schedule them for sending	
		2. Review process for accessing data on how many people viewed materials sent	
		3. Develop next F2F Health Tips and schedule for sending	
Online Tools	• Survey Monkey	1. Review process for developing online survey through *Survey Monkey*	

		2. Review process for sending survey link to participants	
		3. Review process for accessing survey responses and how to download survey reports	
Online Tools	• Website	1. Review process for making website revisions using contracted Webmaster	
		2. Review navigation of current website	