



**2023**

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**CAREER &  
LEADERSHIP SKILLS  
ACADEMY**

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**Provided by the  
Shippensburg University  
Career Center**

**GUIDEBOOK**

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# GENERAL INFORMATION

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## General Information

Welcome to The PA Banker's Association Career and Leadership Skills Academy. This professional development opportunity is a collaboration of the Pennsylvania Bankers Association and Shippensburg University of Pennsylvania. Completion of this program leads to a collaborative non-credit certificate from the Pennsylvania Bankers Association and Shippensburg University of Pennsylvania. The program includes 15 hours of synchronous online instruction.

## Attendance

To earn the Certificate of Completion students must attend 8 of the 10 of the sessions; attendance will be taken each week at the beginning and end of each session. If you need to miss a session, you must contact your supervisor and Mary Angela Baker ([MaryAngelaBaker4@gmail.com](mailto:MaryAngelaBaker4@gmail.com)) before the session to receive an excused absence.

For those students who have more than two excused absences, one make-up assignment may be submitted. Students must watch the recording of the missed session, discuss the session questions with their supervisor, and then write a one-page reflection paper (300-400 words). The paper includes the name and title of their supervisor, lessons learned from the recording and discussion questions, and action student will take or have taken. The paper is submitted to Mary Angela Baker within one week of the missed session being posted on the Resource Page.

## Issues with Connecting

Contact Mary Angela Baker ASAP via email at [MaryAngelaBaker4@gmail.com](mailto:MaryAngelaBaker4@gmail.com) with any connection issues.

## Program Learning Objectives

- Learners will obtain and gain insight on critical career and professional development foundational skills including DEI, interpersonal skills, communication, leadership, teamwork, problem-solving, critical thinking, and emotional intelligence.
- Learners will develop an inclusive leadership style and approach that fits their personal abilities and workplace context.
- Learners will understand a Banking leader's role in equity and inclusion and sustainable business practices.

# GENERAL INFORMATION

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## Diversity, Equity, and Inclusion Statement

If you need to talk with someone regarding issues related to diversity, equity, and inclusion, please contact the following individual:

### Shippensburg University

Dr. Manuel Ruiz, Assistant Vice President for Inclusion and Belonging

Email: MRuiz@ship.edu

Phone: 717-477-1161

Diversity, equity, and inclusion is a priority of Pennsylvania's State System of Higher Education, as well as each partner participating in this program.

Shippensburg University makes every effort to provide educational opportunities to all persons regardless of race, religion, sex, national origin, ancestry, age, sexual orientation, gender identity, gender expression, marital status, disability, or veteran status. This applies to all members of the university community, all applicants for admission or employment, and all participants in university-sponsored activities.

All partners view DEI as integral to the collaborative educational success and continued professional growth of every student, employer, and employee. The institutions/organizations make intentional efforts to provide opportunities to all persons regardless of race, religion, sex, national origin, ancestry, age, sexual orientation, gender identity, gender expression, marital status, disability, or veteran status. Decision making processes consider diverse identities and perspectives as essential elements to all aspects of relationship with and connection to the institution/organization.

## Statement of Compliance

The Office of Equity, Inclusion and Compliance at Shippensburg University coordinates the university's compliance with laws and regulations relating to equal opportunity, sexual harassment, and disabled accommodation. A full description of the Statements can be found on the University website:

[https://www.ship.edu/About/Statements\\_of\\_Compliance](https://www.ship.edu/About/Statements_of_Compliance)

# ACCESS TO COURSE MATERIALS

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**Use this login information for  
every Zoom class!**

**Meeting ID: 974 2933 2534**



**Access resource  
webpage here!**



[career.ship.edu/pba-program-materials/](https://career.ship.edu/pba-program-materials/)  
*If prompted to enter a passcode: PBA2023!*

# SCHEDULE AT A GLANCE

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**Meeting ID: 974 2933 2534**

<b>Leadership Styles</b>	<b>June 1</b>	<b>Dr. Malaika Turner</b>
<b>Diversity, Equity, &amp; Inclusion in the Workplace</b>	<b>June 8</b>	<b>Dr. Lesli Somerset Talley</b>
<b>Etiquette and Social Expectations in the Workplace</b>	<b>June 15</b>	<b>Dr. Allison Carey</b>
<b>Communication and Intentional Listening</b>	<b>June 22</b>	<b>Dr. Wendy Kubasko</b>
<b>Problem Solving &amp; Decision Making</b>	<b>June 29</b>	<b>Hayley Anderson &amp; Jocelyn Clippinger</b>
<b>Networking</b>	<b>July 6</b>	<b>Mary Oliveira</b>
<b>Group &amp; Team Dynamics</b>	<b>July 13</b>	<b>Dr. Tammy Manko</b>
<b>Emotional Intelligence</b>	<b>July 20</b>	<b>Dr. Matthew Shupp</b>
<b>Time Management &amp; Stress</b>	<b>July 27</b>	<b>Dr. Toru Sato</b>
<b>Are you Career Ready? Building your Personal Brand &amp; Communicating Career Readiness</b>	<b>August 3</b>	<b>Victoria M. Kerr</b>

**GRADUATION**

# ZOOM ETIQUETTE

We will be using Zoom for all our online meetings. Zoom is a web conferencing platform that is used for audio and/or video conferencing. There are many different resources available to learn how to use the Zoom features, both in YouTube videos and websites. You can find them by googling: How to Use Zoom. Zoom is updated frequently; be sure to check the posting date of any resources to ensure you have recent information. We will be using the Chat feature during our sessions.

## Join the Meeting Early

You should join early so you can test your technology and to be ready when the session begins.

## Check your Camera and Microphone

Turn your camera and mic on. Meeting virtually is no different from meeting face-to-face. People want to see and hear you while at work.

## Remember You are Always on Camera

Prioritize a work appropriate background and consider your background and lighting.

## Look at the Camera when Speaking

Just like you would look people in the eye during a face-to-face meeting, look at the camera when you are speaking.

## Find Your Strongest Internet Connection

If possible, connect to your hardwired internet. Try to have the most reliable internet connection.

## Eliminate Distractions

Turn off email notifications, put your cell phone on silent, put a sign on the door, and, if at home, put pets in another safe place.

## Stay on Mute if You're Not Talking

Background noise can be distracting. If you aren't sharing anything at the moment, you should remain on mute until talking or presenting. Before you speak, make sure your mic is unmuted.

## Be Respectful – Raise Your Hand

If you want to speak, physically raise your hand or use the "raise hand" feature that is available in the participant panel.

## Use Chat

Chat can be used for questions, comments about the presentation, and to share other resources. Note that the chat will be saved each session.

## Don't Eat During the Meeting

It can be distracting to watch other people eat. Try to hold off on eating if you can, or if not, consider briefly turning off the video and audio until you are done eating.

## Dress Appropriately

It is crucial to remain professional and dress appropriately. Wear something similar to what you would typically wear to work.

## Having trouble connecting?

Contact Mary Angela Baker at [MaryAngelaBaker4@gmail.com](mailto:MaryAngelaBaker4@gmail.com)

# LEADERSHIP STYLES

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June 1, 2023



## Dr. Malaika Turner

The Speakher, LLC

Trainer | Life Coach | Speaker

**This session will discuss leadership styles and the relationship between leadership and influence and the ripple effect it has on the workplace. Learners will discover their personal leadership style and learn the importance of communicating a shared vision.**

### Learning Outcomes

Students will be able to ...

- Identify leadership styles
- Define imposter syndrome
- Identify ways to combat imposter syndrome

### Discussion Questions

- What is your leadership style?
- What impact do you want to make as a leader?

### Action Plan

Identify a person who is a leader to you.

- What leadership attributes do you admire?
- How do you see them in action?
- What's one leadership trait you could leverage in your leadership growth?





# DIVERSITY, EQUITY & INCLUSION IN THE WORKPLACE

8

June 8, 2023



## **Dr. Lesli Somerset Talley**

Associate Director, Office of Career Development  
Chatham University

**This session will act as a micro sensitivity training and cover diversity, equity, and inclusion in the workplace. Students will gain insight on the intersection of social and professional identities and its impact on workplace spaces.**

### **Learning Outcomes**

Students will be able to ...

- Describe the impact of intersectionality on stereotypes, insensitive language, and bias behaviors.
- Recognize actions, language, and behavior that excludes/intimidates others.
- Demonstrate skills and competencies that promote and manage a diverse workplace community

### **Discussion Questions**

- What social identities do you feel have had the greatest impact on your workplace journey or identity?
- In what areas related to diversity, equity, inclusion, or belonging do you still have questions?

### **Action Plan**

In the upcoming weeks, what one action will you commit to that promotes diversity, equity, and/or inclusion?





# LEADERSHIP & BUSINESS ETIQUETTE

9

June 15, 2023

## Dr. Allison Carey

Professor, Chair of the Department of Sociology and Anthropology

Director of the MS in Organizational Development and Leadership

Shippensburg University of Pennsylvania

**This session examines common social practices and expectations in the workplace, such as in the conduct of email, business meetings, and colleague interaction, provides examples of cross-cultural variation in these expectations, and discusses how to identify, meet, and at times challenge these expectations to create a positive work environment.**

### Learning Goals

- Identify best practices in email, meeting, and informal communication.
- Consider how interactional styles and expectations vary by setting, level of power, generation, culture, and purpose.
- Describe how typical expectations regarding business etiquette may foster or hinder workplace civility, relationships, and performance.

### Discussion Questions

- How narrow and pre-determined are the social expectations in the workplace, or how much flexibility is there?
- What are the most important social or business etiquette practices to adhere to and why?
- Why/how does adhering to etiquette standards foster a positive work environment and why/how might these standards foster inequality or act as a barrier to communication?

### Action Plan

Write a thank you note to a faculty member, staff member, colleague, friend and/or family member that has assisted you in the last three months in your professional career path.





# COMMUNICATION & INTENTIONAL LISTENING | 10

June 22, 2023

## Dr. Wendy Kubasko

Associate Professor  
Educational Leadership and Special Education,  
Educational Leadership Program Chair  
Shippensburg University

**This session will provide participants strategies for interpersonal communication and professional communication using social emotional learning. Communication is typically the highest in-demand skill for leadership positions at all levels.**

### Learning Outcomes

Students will be able to ...

- Identify and apply principles of effective verbal communication
- Practice active empathetic listening skills
- Reflect on the impact of digital devices on interpersonal communication

### Discussion Questions

- What are the characteristics of empathetic listening?
- What factors might be a barrier in your communication with others?
- How can improving your communication enhance your customer service and collaborative interactions?

### Action Plan

- From whom can you get honest feedback regarding your communication style and potential growth areas?
- What is one tactic to increase your listening potential?



June 29, 2023



**Jocelyn Clippinger**

Director of Student Success  
Messiah University



**Hayley Anderson**

Associate Director of Career Development  
Shippensburg University

**This session will discuss how leadership is about taking control of situations that arise and being able to problem-solve, review situations, and make decisions as a leader and/or team member. Participants will learn how to reduce conflict through having honest, and sometimes difficult conversations, learn how to diffuse tense situations, and create an inclusive work environment.**

## **Learning Outcomes**

Students will be able to ...

- Recognize ability to work with others in groups, develop communication and problem-solving skills as well as conflict resolution
- Understand the impact of self-understanding, particularly in group contexts in growing human relations

## **Discussion Questions**

- How can I analyze situations and solve problems more systematically and logically?
- What can I do as a leader and/ or team member to support others while making decisions or providing solutions?
- What communication techniques can I use to respond to problems and/ or decision-making situations?

## **Action Plan**

Ask (interview) someone in your bank about a difficult problem they had to solve and how they came up with a decision. What key skills did they use?





**Mary Oliveira**

Chief Operating Officer  
Color & Culture

**This session will explain the importance of networking for career-building. Participants will learn methods to initiate conversations, tips and tricks for networking effectively on and offline and understand how certain behaviors might come across positively or negatively.**

**Learning Outcomes**

Students will be able to ...

- Recognize the messages professional dress and presentation send
- Demonstrate networking techniques with employers effectively on and offline
- Practice techniques for engaging and maintaining conversations

**Discussion Questions**

- What are the steps to take towards building your own strong network?
- What are different strategies for professional communication in the modern workplace?
- How can skills like listening, empathy, and emotional intelligence relate to relationship-building?

**Action Plan**

Go out of your way this week to have a conversation with someone (you don't know) who you would like to add to your professional network?



# GROUP & TEAM DYNAMICS

13

July 13, 2023



## Dr. Tammy Manko

Speaker & Trainer, MeaningfulLife, LLC  
University Career and Professional  
Development Professional

**This session will review collaboration, teamwork, and group dynamics essential to effective functioning within organizations. Participants will learn the stages of team development, how to build a cohesive group, development of group norms, barriers to effective teamwork and group decision-making dynamics.**

### Learning Outcomes

Students will be able to ...

- Understand team development stages and develop strategies for building high-performance teams
- Discuss how team characteristics, strengths/weaknesses, and composition influence team effectiveness

### Discussion Questions

- What are the various stages of team dynamics and/ or its functionality?
- What are characteristics of high performing teams?
- How can you support teambuilding and grow team cohesion within a group?

### Action Plan

- How would you go about building team camaraderie in your current role?
- What is one thing you can implement in the coming months?





# EMOTIONAL INTELLIGENCE

14

July 20, 2023

## Dr. Matthew Shupp

Associate Professor

Department of Counselor Education

Shippensburg University

**This session will cover the aspects of emotional intelligence to help leaders manage their emotions and relationships with others. Emotional intelligence has been cited as the top predictor of career performance and is an invaluable skill.**

### Learning Outcomes

Students will be able to ...

- Define emotional intelligence and recognize how it is exhibited
- Reflect on emotional intelligence's importance in the workplace
- Assess who has influences on them and in what areas of their life

### Discussion Questions

- Which aspects of emotional intelligence do you think you are strongest?
- Which would you prioritize to develop? How?
- How do you plan to incorporate emotional intelligence tactics into your work relationships?

### Action Plan

How do you plan to incorporate emotional intelligence tactics into your work relationships within the Bank?



# TIME & STRESS MANAGEMENT

15

July 27, 2023



## Dr. Toru Sato

Professor, Department of Psychology  
Shippensburg University

**This session will review key skills of managing both stress and time management within your personal and professional lives. Participants will learn techniques that will help them feel more in control of their lives and give them greater satisfaction at work and at home.**

### Learning Outcomes

Students will be able to ...

- Recognize procrastination and apply relevant techniques to achieve their goals
- Identify the basic principles of stress management and recognize their stress triggers and how to manage them effectively

### Discussion Questions

- What are low-stress and time-efficient techniques you can utilize to reduce tension in your life?
- What are the impacts of stress and poor time management in your performance in the workplace?
- What are practical techniques for identifying key time wasters, setting boundaries, handling interruptions, and maximizing productivity?

### Action Plan

Go for a walk outside. What strategies will you commit to destress and manage time?





August 3, 2023



## Victoria M. Kerr

Senior Director, Career Center  
Shippensburg University

**This session will discuss and develop the career readiness competencies necessary to find, acquire, and maintain a rewarding career. Learners will focus on how critical the development of soft skills such as leadership, teamwork, communication, problem solving, and more are in transitioning into the workplace post-graduation.**

### Learning Outcomes

Students will be able to ...

- Demonstrate career readiness skills needed to compete professionally in an ever-changing world of work.
- Describe the key lessons you have learned through the internship. Identify elements of leadership to practice or develop when returning to campus.
- Formulate your approach to leadership going forward

### Discussion Questions

- How can the NACE career readiness competencies improve my ability to build personally and professionally?
- How can I explore my potential, leveraging the career readiness competencies, as an undergraduate student? What are the ways I can demonstrate career readiness in my role?
- What can I do to prepare for a successful transition into the workplace?

### Action Plan

- Ask three new colleagues at the bank to describe you in 3 adjectives.
- What is their first impression of you?
- What do they see as your "brand?"



# PRESENTERS



## Hayley Anderson

### **Associate Director of Career Development**

*Shippensburg University of PA*

Hayley Anderson is a graduate student at Shippensburg University pursuing her Master of Science in Clinical Mental Health Counseling. She holds a Bachelor of Arts in Psychology with a minor in Anthropology from the same institution and an Associate of Applied Science in Music Business from Harrisburg Area Community College. In addition to pursuing an education in counseling, she is enrolled in the Blue Lotus School of Mindfulness Seminary program to further her knowledge of coaching and counseling methods that revolve around mindfulness skills and practices. On top of her educational endeavors, she serves as the Interim Associate Director of Career Development in the Career Center at Shippensburg University. Hayley has always had a passion for helping others and has found that she wanted to dedicate her life to this passion. When she is not studying, in class, working, or at a concert, she can be found spending time with her family, friends, and her Goldendoodle named Oliver.

**CliftonStrengths:** Intellection • Empathy • Connectedness • Developer • Relator



## Mary Angela Baker, M.A.

### **Principal Consultant**

*Firm Fortitude*

Mary Angela Baker, MA, is the principal consultant at Firm Fortitude, a consulting and learning center focusing on professional development and the 60-year lifelong learning curriculum. She has an extensive career in professional development, continuing education, outreach, and community engagement. As founding director of the Center for Extended and Lifelong Learning at Salisbury University, she was responsible for creating educational programs for learners of all ages. Before moving to Maryland, Mary Angela was the director of the Leadership Institute at St. Catherine University. Baker is active in several leadership initiatives, including founding leadership team member of the University of Minnesota's Carlson Women Global Connect, founding member of the United Way of the Eastern Shore's Women United, and executive council member of the International Leadership Association's women's affinity council. She has a BS in Business from the University of Minnesota, and a MA in Organizational Leadership from St. Catherine University. With her husband, Jack, and border collie, Mesa, she spends her free time at Assateague Island National Seashore.



**Dr. Allison Carey**

**Professor, Chair of the Department of Sociology and Anthropology  
Director of the MS in Organizational Development and Leadership**

*Shippensburg University of PA*

Allison C. Carey Ph.D is Professor in and Chair of the Department of Sociology & Anthropology and Director of the MS in Organizational Development and Leadership at Shippensburg University. Her research focuses on disability rights, policies, and activism. Her books include *Disability and the Sociological Imagination* (2023), *Allies and Obstacles: Disability Activism and Parents of Children with Disabilities* (co-authored, 2020), and *On the Margins of Citizenship: Intellectual Disability and Civil Rights in 20th Century America* (2009), as well as several edited collections. She is a co-founder of Shippensburg University's interdisciplinary minor in Disability Studies. She has been awarded the Outstanding Career in the Sociology of Disability award (2021) and Outstanding Book in the Sociology of Disability (2022) from the Disability and Society section of the American Sociological Association and the Scholarly Achievement award (2010, 2021) from the North Central Sociological Association.



**Jocelyn Clippinger**

**Director of Student Success**

*Messiah University*

Jocelyn Clippinger currently serves as the Director of Student Success at Messiah University located in Mechanicsburg, PA. In 2017, she received a dual Bachelor of Arts degree from Messiah University (formerly Messiah College) in Sociology and Anthropology and Communication. She then obtained her Master of Science in Counseling from Shippensburg University with a specialization in College Counseling in 2019. In addition to working in higher education, she is a Nationally Certified Counselor and presently conducts clinical counseling part-time in Lancaster, PA. She currently lives in Carlisle, PA with her husband, cat, dog, and three chickens.



**Victoria M. Kerr**

**Senior Director - Career Center**

*Shippensburg University of PA*

Victoria is the Director of the Career Center at Shippensburg University. Since Starting at Shippensburg University in 2013, Victoria loves developing new and innovative programs designed to assist students in reaching their academic and career goals. She is passionate about connecting students to their purpose and developing those interests, skills, and abilities into a successful career path. Previous to Shippensburg University, she served as the Director of the Career Development Center/Undeclared Students at Shepherd University and held roles within Human Resources for over 8 years at the American Bar Association, American Woodmark, and ATPCO. Victoria holds a Master of Arts in College Student Development from Shepherd University and a Bachelor of Arts in Law and Society from American University.





### **Dr. Wendy Kubasko**

#### **Assistant Professor - Educational Leadership and Special Education, Educational Leadership Program Coordinator**

*Shippensburg University of PA*

Dr. Wendy Kubasko brings over twenty-five years of experience in public education. She earned her undergraduate degree from Shippensburg University of Pennsylvania. Beginning her career outside of Washington, D.C., Dr. Kubasko chose to work with underserved populations. She moved to Phoenix, Arizona teaching middle and elementary schools in Title I school districts. She earned her Master's in Curriculum and Instruction in Mathematics at Arizona State University. After years in the classroom, Dr. Kubasko moved into district support roles, first as a professional development coordinator, then as a Director of Curriculum and Instruction, Administrator for Academic Services, and finally, the Assistant Superintendent for Avondale Elementary School District. In 2015, Dr. Kubasko received her Ed.D. in Educational Leadership and Innovation from the Mary Lou Fulton Teachers College at Arizona State University. Dr. Kubasko's research centers on the use of collaborative learning for school and district leaders around common problems of practice.



### **Dr. Tammy Manko**

#### **Speaker & Trainer, MeaningfulLife, LLC**

#### **University Career and Professional Development Professional**

As the owner and founder of MeaningfulLife, LLC, and the director of a university career center, Tammy Manko is an award-winning higher education professional with experience and expertise in the areas of body language/communication, professional networking, relationship building, leadership, career readiness, etiquette, positivity, change management, customer service, and various professional development topics. She holds a doctoral degree in Educational Leadership, a master's degree in Higher Education Administration, and a bachelor's degree in English, is a lifelong learner, and enjoys reading and sharing knowledge. She has three sons and loves spending time with family/friends, traveling when she can, and interacting with others.



### **Mary Oliveira**

#### **Chief Operating Officer**

*Color & Culture*

Mary Oliveira serves as Chief Operating Officer of the newly formed multi-cultural marketing and advertising agency, Color & Culture. She joined the firm in late 2022 to lead the company through a merger. In this capacity she is designing and implementing business strategies, plans and procedures; setting comprehensive goals for performance and growth, and overseeing the daily operations of the company while working to promote the company culture, mission and vision. Prior to joining Color & Culture, Mary spent four years in an executive leadership role with the Pennsylvania Chamber of Business and Industry. She oversaw all Marketing, Membership and Events departments while contributing to the strategic plan and growth of the Chamber. Mary cultivated many relationships across the state in both the public and private sectors in support of the Chamber mission as the statewide voice of business. Her eleven year tenure with PSECU before landing at the Chamber fueled her passion for community service and desire to impact change at a statewide level. Mary holds a Bachelor's Degree in International Studies and Communications from The American University in Washington, DC and a Master's Degree in Organizational Development & Leadership from Shippensburg University. She has served on multiple non-profit boards and national professional association board and was recognized as a Harrisburg YWCA Woman of Excellence in 2015 as well as an inaugural City & State Above and Beyond honoree in 2022. Mary lives in Enola with her husband Paulo, who is a native of Brazil. Their son, Sebastian, is currently working towards a Master's Degree in Journalism at Georgetown University and daughter, Sofia, is a nursing student at UPMC School of Nursing in Pittsburgh working to become an RN. The bi-cultural and bilingual Oliveira household enjoys traveling, soccer, music, coffee and many other things that bring them together with family and friends.



**Dr. Toru Sato**  
**Professor - Department of Psychology**

*Shippensburg University of PA*

Toru Sato received his Ph.D. in Psychology at York University in Canada and currently serves as a Professor in the Department of Psychology at Shippensburg University. He is passionate about studying emotions, human relationships, and consciousness. He is the author of "Two, One, None: Conversations on Meditations" and "The Ever-Transcending Spirit: The Psychology of Human Relationships, Consciousness, and Development" as well as numerous essays, book chapters, and research articles. He has had the privilege to work with numerous individuals on their personal development mainly in the areas of time management, stress management, relationship issues, and mindfulness skills.



**Dr. Matthew Shupp**  
**Associate Professor - Department of Counseling & College Student Personnel**

*Shippensburg University of PA*

Dr. Matthew R. Shupp is an Associate Professor in the Department of Counselor Education at Shippensburg University where he developed and teaches a course on Emotionally Intelligent Leadership. Prior to his role as faculty, Dr. Shupp was a student affairs professional in a variety of institutional settings. He is both a National Certified Counselor (NCC) through the National Board for Certified Counselors (NBCC) as well as a Board Certified Tele-Mental Health Provider (BC-TMH). He is an Approved Clinical Supervisor (ACS) and licensed as a professional counselor (LPC) in the state of Pennsylvania. Most recently, Dr. Shupp was selected for addition to the Fulbright roster as a Fulbright Specialist (2021-2025).



**Dr. Lesli Somerset Talley**  
**Associate Director - Office of Career Development**

*Chatham University*

Dr. Lesli Somerset Talley has always had a passion for helping people feel confident in their abilities by using an equity-minded lens. She holds a B.S. in psychology, an M.A. in student affairs in higher education, and Ph.D. in instructional management and leadership where she focused on career development, intersectionality, and workplace inclusion. For the last seven years, she has worked in higher education where she provides career and professional development to college students and alumni. Lesli founded Salty Career to help her clients achieve their next steps by using an inclusive and collaborative approach.



**Dr. Malaika Turner**  
**The Speaker, LLC**  
**Trainer | Life Coach | Speaker**

*Indiana University of Pennsylvania*

Dr. Malaika Turner is the Assistant Vice President for Student Affairs at Indiana University of Pennsylvania and Co-Director of Frederick Douglass Institute. She has more than 20 years of supervisory experience and extensive oversight managing numerous projects. Dr. Turner has facilitated several motivational trainings and workshops on leadership, empowerment, and her favorite topic - public speaking. She is the author of Walking in Step with God on Purpose and can be found on Instagram, motivating women with her "Good Morning, Beautiful" posts. Lastly, she is the host of PIVOT podcast, which can be found on most listening platforms.

# S.M.A.R.T GOAL WORKSHEET

MENTEE NAME:

MENTOR NAME:

A **SMART** goal is defined as a goal that is specific, measurable, achievable, realistic and time-bound.

**Specific:** Goals should be simply written and clearly define what you are going to do. Specific is the what, why, and how of the SMART model.

**Measurable:** Goals should be measurable so that you have tangible evidence that you accomplished the goal. Usually, the entire goal statement is a measure for the completion of the goal, but there are several short-term or smaller measurements built in along the way.

**Achievable:** The goal should be achievable; it should stretch you slightly so you feel challenged but also be defined well enough that you can achieve it. You must possess the appropriate knowledge, skills, and abilities needed to achieve the goal. Achievable goals are motivating. Impossible goals can be demotivating.

**Realistic:** The goal should be something you can realistically accomplish within the given timeframe.

**Timely:** Goals should be linked to a timeframe that creates a practical sense of urgency, or results in tension between the current reality and the vision of the goal. Without such tension, the goal is unlikely to produce a relevant outcome.

## Goals to Think About:

- Manage one's professional brand; increase social media presence
- Building or enhancing a LinkedIn Profile
- Researching Graduate Schools
- Expanding one's network outside of college/university
- Gaining more visibility within my current organization
- Dealing with a difficult boss
- Starting a new job
- Interviewing techniques
- Dealing with interview stress – best practices
- Researching potential employers
- Increasing executive presence
- Enhancing my communication skills

## Flip to the back for worksheet!





# S.M.A.R.T GOAL

DATE: \_\_\_\_\_

GOAL: \_\_\_\_\_

<b>Specific</b>	<ul style="list-style-type: none"><li>• What do I want to accomplish?</li><li>• Why do I want to accomplish this?</li><li>• What are the requirements?</li><li>• What are the constraints?</li></ul>	
<b>Measurable</b>	<ul style="list-style-type: none"><li>• How will I measure my progress?</li><li>• How will I know when the goal is accomplished?</li></ul>	
<b>Attainable</b>	<ul style="list-style-type: none"><li>• How can the goal be accomplished?</li><li>• What are the logical steps I should take?</li></ul>	
<b>Realistic</b>	<ul style="list-style-type: none"><li>• Is this a worthwhile goal?</li><li>• Is this the right time?</li><li>• Do I have the necessary resources to accomplish this goal?</li><li>• Is this goal in line with my long term objectives?</li></ul>	
<b>Timely</b>	<ul style="list-style-type: none"><li>• How long will it take to accomplish this goal?</li><li>• When is the completion of the goal due?</li><li>• When am I going to work on this goal?</li></ul>	

## Meeting Schedule

***Please send a draft of your SMART goal to your mentor before your first meeting.***

Meeting Date, Time and Format (In-Person, Video Conference, Phone)

**First Meeting:**

**Second Meeting:**

**Third Meeting:**

*Suggested meeting cadence: Connect three times for 60-90 minutes during early June, late June/early July, and late July 2023.*

## Questions to consider with the mentor

- Why is this goal important?
- What are the benefits of achieving this goal?
- What are potential obstacles?
- What are potential solutions?
- Who are the people you will ask for help?
- What other resources will you require?
- What steps need to be taken to get you to your goal?

## Example Meeting Structures

Meeting #1

Introductions; get to know each other personally and professionally

Discuss the challenge the mentee is currently facing and wants help working through

Establish a SMART goal for the mentee to start tackling this challenge throughout the duration of the program

Talk about next steps/how the mentee can achieve the SMART goal (Example: 3 small steps you could take to move toward your goal in the next 90 days; plan them out to discuss across the sessions)

Meeting #2

Accountability: Review your SMART goal and the action(s) you took since the last meeting

Discuss what the mentee tried; what worked, what didn't work?

Discuss next steps the mentee can take

Meeting #3

Accountability Review your SMART goal and the action(s) you took since the last meeting

Discuss what the mentee tried; what worked, what didn't work?

Discuss next steps the mentee can take, if needed

Celebrate success if goal is completed

## Do's: Best Practices

- Listen attentively
- Provide direction
- Share your stories
- Ask powerful questions to deepen learning or insight
- Focus on something achievable (small, attainable goals)
- Be an accountability partner
- Help mentee recognize their strengths and untap their potential
- Encourage mentee to move into action
- Drive open and candid dialogue
- Provide honest feedback in all conversations
- Create a safe space
- Celebrate Success

## Don'ts: Things to Avoid

- Distractedness/divided attention
- Focus on weaknesses vs. strengths
- Talk only about yourself
- Feel like you have to have all the answers
- Betray confidentiality
- Use irrelevant examples/stories
- Miss a meeting without prior notification

# Mentee Guidelines

## Do's: Best Practices

- Be clear about your objectives & what you're looking for out of the relationship
- Come prepared to each meeting with questions/ideas/things to talk about and any "homework"
- Ask your mentor about their work, life, experiences
- Be open to new ideas & your mentor's perspectives
- Be proactive about reaching out
- Focus on something achievable (small, attainable goals)
- Be action-oriented, especially because you have limited interactions
- Be mindful of time in meetings (starting & ending on time)
- Drive open and candid dialogue-this should be a safe space
- Formally thank your mentor for their time, knowledge and expertise

## Don'ts: Things to Avoid

- Distractedness/divided attention
- Feel like you have to have all the answers
- Betray confidentiality
- Forget that you have valuable experiences to share with your mentor, too!
- Miss a meeting without prior notification
- Not prepared



Shippensburg University offers assistance for students in the PA Bankers Association's Career Development & Internship Experience. These services include a resume review, guidance in developing a LinkedIn profile, and professional dress resources. **The SU Career Center has professional dress clothing for any students who may need access to acquiring clothing. With hundreds of donated clothing items organized to make selection easy, the closet is a helpful resource. Students are welcome to browse the closet for one free outfit per semester. To take advantage of this program, contact the Shippensburg University Career Center.** When contacting the Center, please indicate that you are part of The PA Bankers Association's Career and Leadership Skills Academy.

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