Effective Mentoring Practices
A Program to Support Successful Mentorships
Volume 1. For Mentees

Last Updated: July 2017

Materials in this handbook are derived from the following resources:
www.nationalmentoringresourcescenter.org
www.mentor.org
# Effective Mentoring Practices

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This guide contains key tools to help you begin and continue a successful mentorship. Once you’re matched with your mentor, follow the steps below to get a quick sense of what’s available in this guide and what would be helpful for you.

**What to Expect?**
Take a peek at your 12-week mentorship timeline to get a sense of what you’ll be working on with your mentor.

*Page 7. Your 12-Week Mentorship*

**Review Your Forms!**
Take a look at some key documents that will help you share information with your mentor before your first conversation.

*Section 2. First Impressions*

**Prepare for Success!**
Look professional by checking out tips and tricks for having great meetings and effective communication.

*Section 1. Your New Mentor*
*Section 2. First Impressions*
*Section 4. Business as Usual*

**Track Your Progress!**
Track and create new goals online.

*Section 3: Setting and Meeting Goals*
Congratulations on your match! Whether you’re new to mentorships or you’re a seasoned mentee, there are some simple concepts to keep in mind that can help you get the most out of this program.

Effective Mentoring Practices

Your New Mentor

Contents

- What is a Mentor?
- Your Role and Responsibilities
- Your 12-week Mentorship
Your mentor is here to support you in your academic and professional development. For many of you, this is probably the first time you’ve had a mentor. Not to fear! This guide will serve as a crash course in knowing what to expect and how to get the most out of your mentorship.

**What a Mentor Is**

**A trusted guide.** Not everyone feels comfortable asking for help. Talk to your mentor about what you’re interested in learning and be honest about what you don’t know. Your mentor has tons of experience that they can share with you to apply to your own goals and life.

**Someone who will listen to you.** Your mentor is here to learn about what you need and how their experiences can help you thrive in your academics and career.

**Someone who will help you explore opportunities.** Expand your community and use this relationship to learn from others. Your mentor can introduce you to new concepts and new ways to think about what you’d like to accomplish.

**Someone who will have good ideas about how to deal with difficult situations.** Your mentor has been there and done that. Talk about challenges you’re facing and how you could apply solutions to keep moving forward.
The responsibilities of a mentee are simple: have a desire to learn and continue to develop professionally. Below are a few guidelines to help you put your best self forward during your interactions with your mentor.

**Clarify how you will communicate**

Fill in the “Partnership Agreement” ahead of time. Be ready to go over your answers with your mentor. Be open about how you will communicate and set expectations for what traits are important to you in a mentor. Does your mentor prefer texts, phone calls, or emails?

**Prepare for your meetings and conversations**

Take a look at “Meeting Checklists.” Make sure you follow-through on commitments you made last time you met. Make a list of questions that you want to ask in advance. This lets your mentor know that you are taking their time, (and the relationship) seriously.

**Learn from the whole person**

Even if you want your mentors to help with some very specific things, never forget that you can learn so much more if you pay attention to all of the things that make them the person they are.
Effective Mentoring Practices
Your 12-week mentorship

Meeting #1
- Get to know each other
- Review Partnership Agreement
- Review Short/Long Term goals

Meeting #2
- Refine Short/Long Term goals
- Create tasks to accomplish short term goals
- Discuss how mentorship can assist with reaching long-term goals

Meeting #3
- Start checking off tasks for short term goals
- Set up next meeting(s) to accomplish short term goals and make progress towards long term goals

Meeting #4...
- Start checking off tasks for short term goals
- Set up next meeting(s) to accomplish short term goals and make progress towards long term goals

Last meeting
- Reflect on mentorship
- Discuss goals for future correspondence
- Thank you’s and conclusion of formal mentorship

Week 1: Set Goals
Week 2-3: Refine
Week 3-11: Achieve Goals
Week 12: Wrap Up
Effective Mentoring Practices

First Impressions

Contents
- Partnership Agreement
- Setting Short-Term Goals With Your Mentor
- Setting Long-Term Goals With Your Mentor
- Your First Meeting
Overview

Clarify with your mentor how you will engage with each other during your mentorship. Take a look at the example Partnership Agreement below.

Fill in your worksheet under Mentee Resources and upload it to your shared files online. Set expectations and talk about your answer choices in your first meeting.

Meeting Preferences

Preferred mode(s) of communication

- Phone
- Text
- Email
- Video Chat
- In-Person
- No Preference

Desired communication frequency

- Weekly
- Every other week
- Monthly
- As needed
- Other ______________

Desired response time:

- One day
- Three days
- One week
- Other ______________

Desired time to notify if you will miss a meeting:

- One day
- Three days
- One week
- Other ______________

Select the importance of the following traits in a strong mentorship:

<table>
<thead>
<tr>
<th>Trait</th>
<th>Very Important</th>
<th>Important</th>
<th>Moderately Important</th>
<th>Of Little Importance</th>
<th>Unimportant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curiosity</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Discretion</td>
<td>☑</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Generosity</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Honesty</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Self-Reflection</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Sensitivity to diversity (e.g. culture, race, gender, religion)</td>
<td>☑</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
Overview

Setting short-term goals is key for helping you discover what you want — and can — achieve in your mentorship. Take a look at the example “Short-Term Goals Worksheet” below.

Fill in your worksheet under Mentee Resources and upload it to your shared files online. Work with your mentor to refine and clarify these in your second meeting. Agree on tasks that will help you reach your goals.

Short-Term Goals Worksheet Example

Consider the activities below and concentrate on your top goals for this year.

Indicate your interest in learning more about the following topics:

<table>
<thead>
<tr>
<th>Low</th>
<th>Medium</th>
<th>High</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>☐</td>
<td>☑</td>
<td>☐</td>
</tr>
</tbody>
</table>
Learn 3 insights into my mentor’s academic experience
| ☑   | ☐     | ☐   | ☐   |
Learn 3 insights of how personal and professional life fits together
| ☐   | ☑     | ☐   | ☐   |
Learn 3 successful job interview tactics
| ☐   | ☑     | ☐   | ☐   |
Learn 3 ways to improve my chances of getting a competitive and desirable job
| ☑   | ☐     | ☐   | ☐   |
Improve my resume/portfolio/CV and use it to apply to 1 job
| ☑   | ☑     | ☐   | ☐   |
Shadow my mentor at their workplace twice

Other activities: I am a first generation college student. Any advice on transitioning into college life and being away from my family would be helpful.
Effective Mentoring Practices
Setting Long-Term Goals With Your Mentor

Overview

Setting long-term goals is key to giving you direction to where you really want to end up, not just somewhere circumstances may take you. Take a look at the example “Long-Term Goals Worksheet” below.

Fill in your worksheet under Mentee Resources and upload it to your shared files online. Work with your mentor to refine and clarify these in your second meeting. Agree on tasks that will help you reach your goals.

Long-Term Goals Worksheet Example

Concentrate on what you’d like to accomplish over the next few years. How can your mentor help set you up to accomplish these goals? Take a look at the example and fill in a few of your own.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Mentee Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>List 1-3 long term goals</td>
<td>1. Apply to law school</td>
</tr>
<tr>
<td></td>
<td>2. Graduate with top honors</td>
</tr>
<tr>
<td>How can your mentor help you achieve these goals?</td>
<td>* Share how they decided what to major in and how that related to what law school they eventually attended</td>
</tr>
<tr>
<td></td>
<td>* Share insights into how to balance school and still enjoying college life</td>
</tr>
<tr>
<td>List resources/skills that you currently possess that helps you achieve these goals</td>
<td>* I am a member of the Latino Pre Law Society and we have assistance with the application process</td>
</tr>
<tr>
<td>List resources skills you would like your mentor to help you develop.</td>
<td>* Are there any resources you would recommend I look into?</td>
</tr>
<tr>
<td>What is the biggest challenge to achieving your goal?</td>
<td>* Being unsure that I am on the right path to get accepted into law school.</td>
</tr>
</tbody>
</table>
Have a great first meeting with your mentor by coming prepared and practicing effective communication strategies.

**Ask Questions**
Why is “self-reflection” very important to your mentor? What other expectations do you both have that were not addressed in the Partnership Agreement?

**Show Appreciation**
Express thanks for through follow-up messages and/or during your conversations.

**Be Aware of Body Language**
Your facial expression and/or the way you sit and stand often says much more than words. Body language sends a message that you are or are not listening.

**Listen Well**
Listen to what the other person says and make an effort to understand what they mean.

Successful First Meeting!
Effective Mentoring Practices
Setting and Meeting Goals

Contents
Tracking Goals Online
Setting Tasks to Accomplish Goals
We’ve set up some starter goals for you during your 12-week mentorship under the “Goals” section in your communications. These goals reflect milestones you can check-off throughout the program. Customize these goals throughout the mentorship!

<table>
<thead>
<tr>
<th>GOAL/TASK</th>
<th>SHARED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up your first meeting and review your first meeting checklist</td>
<td></td>
</tr>
<tr>
<td>Upload a filled in version of the Partnership Agreement</td>
<td></td>
</tr>
<tr>
<td>Upload a filled in version of the Short- and Long-Term Goals Worksheets</td>
<td></td>
</tr>
<tr>
<td>Have your first meeting and review your worksheets</td>
<td></td>
</tr>
<tr>
<td>Set up your second meeting</td>
<td></td>
</tr>
<tr>
<td>Refine and upload an updated Short-Term Goals worksheet</td>
<td></td>
</tr>
<tr>
<td>Refine and upload an updated Long-Term Goals worksheet</td>
<td></td>
</tr>
<tr>
<td>Fill in additional tasks to achieve short- and long-term goals</td>
<td></td>
</tr>
<tr>
<td>Set up your third meeting...</td>
<td></td>
</tr>
<tr>
<td>Schedule your match closure meeting</td>
<td></td>
</tr>
<tr>
<td>Reflect on your mentorship</td>
<td></td>
</tr>
</tbody>
</table>
After you’ve finished reviewing and refining your goals with your mentor, add those new goals (and tasks to reach those goals) online! See the example below.

Add your new refined goals under **YOUR GOALS**:

<table>
<thead>
<tr>
<th>SHARED GOALS</th>
<th>YOUR GOALS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GOAL/TASK</strong></td>
<td><strong>SHARED</strong></td>
</tr>
<tr>
<td>![Check Box]</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Short Term Goal 1: Learn 3 insights into my mentor’s academic experience</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>More Detail</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>![Check Box]</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Short Term Goal 2: Learn 3 insights of how personal and professional life fits together</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>More Detail</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>![Check Box]</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Short Term Goal 3. Learn 3 successful job interview tactics</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>More Detail</td>
<td>![Check Box]</td>
</tr>
</tbody>
</table>

… and add new tasks under **SHARED GOALS** so you can both track progress:

<table>
<thead>
<tr>
<th>SHARED GOALS</th>
<th>YOUR GOALS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GOAL/TASK</strong></td>
<td><strong>SHARED</strong></td>
</tr>
<tr>
<td>![Check Box]</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Schedule a video chat with my mentor to learn about the classes my mentor took, which classes were the most worthwhile, and how their academic experience tied back to their career choice.</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>More Detail</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>![Check Box]</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Schedule a phone conversation with my mentor and ask about the first time they encountered this to be challenging, what they did to address it, and what they learned from it</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>More Detail</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>![Check Box]</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Schedule an in-person mock interview with my mentor and ask for three ways you could improve for a real interview.</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>More Detail</td>
<td>![Check Box]</td>
</tr>
</tbody>
</table>
Effective Mentoring Practices

Business as Usual

Contents
Match Closure
Over a lifetime, mentorships end for many reasons; because circumstances change, people move, interests change, etc. The program that you have joined is set up to last for 12 weeks. At that time, your formal relationship with your mentor will draw to a close. Reflect on the questions below to prepare for your last meeting with your mentor:

**Continuing an Informal Mentorship**

You and your mentor may decide to continue an informal mentorship outside of this program. Make sure to have an open conversation as your mentorship closes to see if this is something you and your mentor are interested in. Review the questions below to aid in the transition:

- How frequently can you contact them?
- How do they prefer to be contacted?
- What kind of ongoing support are they willing to provide?
Effective Mentoring Practices

Mentee Resources: Checklists and Worksheets

Contents

Meeting Checklists
Sample Meeting Agendas
Ice Breaker Activity
Partnership Agreement

Short-Term Goals Worksheet
Long-Term Goals Worksheet
Helping Your Mentor Get to Know You
Complete the items below, prior to your meetings, for successful conversations:

First Meeting

☐ Complete Partnership Agreement
☐ Complete Setting Short-Term and Long-Term Goals section
☐ Send Partnership Agreement and Setting Short- and Long-Term Goals worksheets to your mentor two days prior to your meeting
☐ Research your mentor (What company do they work for? What do they do?)
☐ Make a list of questions about topics you’re interested in talking to them about
☐ Send a thank you note to your mentor (after your meeting)

Future Meetings

☐ Review tasks that you and your mentor agreed upon in the previous meeting
☐ Upload/send any documents to your mentor two days prior to your meeting
☐ Make a list of any questions you may have about conversation topics or new items
☐ Send a thank you note to your mentor (after your meeting)

Last Meeting

☐ Reflect on the mentorship—what have you learned? What are you thankful for?
☐ Reflect on any final questions you may have.
☐ Send a thank you note to your mentor (after your meeting)
Effective Mentoring Practices
Partnership Agreement

To help ensure a successful mentorship, set your preferences and expectations below. In your first meeting, agree on how you will communicate and review your answer choices together.

Meeting Preferences

Preferred mode(s) of communication

[ ] Phone
[ ] Text
[ ] Email
[ ] Video Chat
[ ] In-Person
[ ] No Preference

Desired communication frequency

[ ] Weekly
[ ] Every other week
[ ] Monthly
[ ] As needed
[ ] Other __________

Desired response time:

[ ] One day
[ ] Three days
[ ] One week
[ ] Other __________

Desired time to notify if you will miss a meeting:

[ ] One day
[ ] Three days
[ ] One week
[ ] Other __________

Select the importance of the following traits in a strong mentorship:

<table>
<thead>
<tr>
<th>Trait</th>
<th>Very Important</th>
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<th>Moderately Important</th>
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<td></td>
</tr>
<tr>
<td>Discretion</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generosity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Honesty</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Self-Reflection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sensitivity to diversity (e.g., culture, race, gender, religion)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Effective Mentoring Practices
Short-Term Goals Worksheet

Short-Term Goals

Consider the activities below and concentrate on your top goals for this year.

Indicate your interest in learning more:

- Learn 3 insights into my mentor’s academic experience
- Learn 3 insights of how personal and professional life fits together
- Learn 3 successful job interview strategies
- Learn 3 ways to improve my chances of getting a competitive and desirable job
- Improve my resume/portfolio/CV and use it to apply to 1 job
- Shadow my mentor at their workplace twice
- Other activities__________________________

Keep Your Goals S.M.A.R.T.
Specific
Measurable
Action-Oriented
Realistic
Timely

Low  Medium  High  N/A
## Long-Term Goals

Concentrate on what you’d like to accomplish over the next few years. How can your mentor set you up to accomplish these goals?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Mentee Response</th>
</tr>
</thead>
<tbody>
<tr>
<td>List 1-3 long term goals</td>
<td></td>
</tr>
<tr>
<td>How can your mentor help you achieve these goals?</td>
<td></td>
</tr>
<tr>
<td>List resources/skills that you currently possess that helps you achieve these goals</td>
<td></td>
</tr>
<tr>
<td>List resources skills you would like your mentor to help you develop.</td>
<td></td>
</tr>
<tr>
<td>What is the biggest challenge to achieving your goal?</td>
<td></td>
</tr>
</tbody>
</table>

Keep Your Goals S.M.A.R.T.
- **Specific**
- **Measurable**
- **Action-Oriented**
- **Realistic**
- **Timely**
Help your mentor get to know you better in advance! Try filling in the table below and share your thoughts around career, education related topics, or other things that you’d like your mentor to know about you.

<table>
<thead>
<tr>
<th>Life Area</th>
<th>I feel confident about…</th>
<th>I have these opportunities…</th>
<th>I need help with…</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Example topics:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>resume help, job</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>shadowing, information</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>interviews, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Example topics:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>choosing a major, classes, GPA standards in industry, etc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Example topics:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>balancing family and career, etc.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Effective Mentoring Practices
Mentee Resources: Agendas and Activities

Contents
Sample Meeting Agendas
Ice Breaker Activity
First Meeting
(1 hour agenda)
Pre-meeting action item: Review “First Meeting Checklist”

15 Minutes: Get to know each other (See Mentee Resources: Ice breaker Activities)
10 Minutes: Thoughtfully review answers from the pre-filled Partnership Agreements.
35 Minutes: Go over prefilled short/long term goals and set tasks to complete by the next meeting (see Sections 5 and 6)
5 Minutes: Set a time to meet again and go over any questions

Last Meeting
(30 minute agenda)
Pre-meeting action item: Review “Last Meeting Checklist”

10 Minutes: Reflect on the mentorship—what have you learned?
10 Minutes: Talk about the future—what will your next steps be? Does your mentor have any parting advice for you?
5 Minutes: Have an open conversation around informal mentoring. Is this something you both are interested in?
5 Minutes: Thank each other and acknowledge each other’s contributions
Get to know each other in your first meeting by asking questions that highlight the unique qualities and shared experiences. Below are a few questions to get the conversation flowing.

**Sample questions you could answer together**

**Personal**
- Where are you from and how did you make your way to where you are now?
- Who was someone that had a positive influence on you when you were younger (or now)?
- What is the most daredevil thing you’ve ever done and how was that experience?
- If you could travel to any place in the world, where would you go?

**Education/Career Focused**
- What do you wish you did, but didn’t get a chance to do, while you were in school?
- What made you sign up for the mentorship program? What are you looking to accomplish?
- What was your first job?