

Assigning a Mentor and Best Practices

Introduction: How to Use This Tool

Provide this resource to mentors and mentees to facilitate an effective mentoring relationship. This resource provides advice about both informal and formal mentoring. If you do not want to provide advice on informal mentoring, simply delete the sections that are in grey and have the word [informal] next to the title.

To use this template, replace the text in dark grey with information customized to your organization. When complete, delete all introductory or example text and convert all remaining text to black prior to distribution.

What is mentorship and why is it important?

Mentorship is the exchange of information and experience between mentors and mentees. Mentors aim to provide social and career support to mentees, aiding with personal development. Engaging in a mentoring relationship creates value for all parties involved. Mentees gain increased career satisfaction and better understanding of their strengths/weaknesses, learn how to capitalize on opportunities, and develop problem-solving skills. Mentees are able to expand their personal network and gain a source of referrals. Mentors learn more about themselves, acquire new knowledge, and help contribute to the success of the organization.

When seeking out a mentor, do the following [informal]:

- Be prepared to describe how you feel their experiences/expertise can benefit you and what you hope to gain from the relationship.
- Communicate the time commitment you are looking for from them, whether it's a one-time discussion or an ongoing engagement over the course of a year. This will enable the potential mentee to determine if they are willing and able to commit to the mentoring relationship.
- If someone does not want to be a mentor, do not take it personally. Many people will be honored and willing to mentor, but some may not. There are many reasons why they may decline, including whether they have the time available or feel that they have sufficient expertise to help you achieve your goals.

What are the responsibilities of mentors and mentees?

Generally speaking, mentors and mentees may assume the following responsibilities:

Mentor	Mentee
Ask thought-provoking questions to guide decision making.	Establish clear goals for the mentoring relationship.
Role modeling through words and actions.	Identify strengths/weaknesses; find gaps in skillset to begin improvement.
Demonstrate critical thinking for effective decision making through problem solving and analysis.	Plan and coordinate meetings; establish timeframes and assess when mentor and mentee should part ways.
Facilitate the mentee's ability to practice self-development.	Actively listen, ask questions, and follow through on assigned tasks.
Provide objective and constructive feedback.	Communicate values and needs to the mentor.
Provide career and social support.	Track progress made along the mentorship and make adjustments if necessary.

Who should be your mentor/mentee?

- **Mentees do not need to look for a “perfect” mentor.** The goal of a mentoring relationship is to transfer knowledge, skills, and experience between the mentor/mentee. Naturally, several people can help the mentee achieve this goal. Having access to a breadth of different mentors is more beneficial to mentees than being perfectly matched with one ideal mentor. As a rule of thumb, the more diverse the backgrounds and skillsets mentees can draw from the better.
- **The mentor’s social/interpersonal skills are just as critical as chemistry.** You do not need to be tremendously concerned with finding a perfect “match” between mentors and mentees.
- **Mentors do not need to be seasoned veterans.** Often, for younger mentees, being matched with a mentor five to ten years into their career can be just as effective as being matched with someone more senior. Mentors five to ten years into their career may be in a better position to help the mentee, as they’d be working in the positions mentees are interested in. The mentee will feel more comfortable in sharing and the mentor will be able to relate better to their experiences, having more recently worked through similar issues. If the knowledge and experience gap is too large, it can lead to confusing and counter-productive relationships by not speaking at the same level.
- **Depending on the goal of the mentoring relationship, mentors should have experience in the mentee’s field of interest.** If looking for field-specific mentorship, then look for alignment in experience. However, if looking for more general expertise (leadership) a mentor can come from a wider array of disciplines.

How long should mentorships last?

Given the fact that mentorships exist to transfer information between mentors and mentees, it is unhelpful to mandate a specific period of time after which mentorships must end. Rather, formal, structured mentorships should last until their goals have been accomplished, the relationship runs out of steam, severe personality mismatches exist, or unforeseen circumstances arise. However, if things have been progressing exceptionally well, the mentor and mentee’s relationship may transform into a long-term friendship, leading to more informal meetings in the future.

What are some good questions to ask during a mentoring engagement?

Ask thoughtful and thought-provoking questions to guide decision making and problem solving. Practice active listening in regular, meaningful conversations. Use the questions below to help build your mentoring relationship:

Question Type	Follow-Up Questions
Where are you now?	<ul style="list-style-type: none">• What is the situation, problem, or issue you are working on?• Are there any risks, difficulties, or stress you will be facing in the next few months (deadline, conflicts, fears, etc.)?
Where do you want to be?	<ul style="list-style-type: none">• What is your goal (growth area)?• What would you like to be remembered for over the next few years (personal vision)?• What do you think will be the most challenging or rewarding for you?
How do you plan to get there?	<ul style="list-style-type: none">• What steps can you take to achieve that goal?• What is your plan to minimize any upcoming risks, difficulties, or stress?• What are your strengths and how will they help you reach your goal?• What skills or knowledge do you hope to gain from this experience?• What are you most worried about or afraid of?

What happened?	<ul style="list-style-type: none"> • What action did you take? • How well did you accomplish your goal? • What did you learn? • How can you use this knowledge, skill, or ability in the future? • What was the most challenging or rewarding for you? • How are you different now than you were at the beginning?
-----------------------	--

How to maximize time?

- Schedule meetings in advance.
- Be serious and diligent about scheduling and keeping appointments and returning emails and phone calls.
- Do not multitask at mentoring meetings – both partners should focus solely on the issues at hand. Turn off your phones.
- Fully prepare for any discussions or meetings beforehand – both you and the mentee.
- Focus the session on critical issues by starting each session or discussion with a progress review or update.
- Book a follow-up session at the conclusion of a meeting or discussion.
- Monitor the time spent on mentoring and look for opportunities to more effectively and efficiently use that time.

How do you evaluate the mentoring relationship?

Throughout, take the time to evaluate the mentoring relationship. The mentor/mentee should answer the following questions:

- Are we on track to reach the goals of our mentoring relationship?
- What do I think about my mentor/mentee?
- What is working well, and why?
- What could be working better?
- What changes can be made to make things work better?
- What are we spending too much time on?
- What are we spending too little time on?
- How well are we communicating?
- Is there anything we can do to improve our communications?
- Is there anything we can do to more effectively use our time?
- Are there any other changes we can make to improve the relationship?

What mentoring obstacles exist?

- Time – lack of time or mentee wants too much time.
- Distance – being too far away to sustain a meaningful relationship.
- Incompatibility – your personalities or mentoring style don't match.
- Mentee needs too much help or is too reliant.
- Mentee gets defensive when feedback is given.
- Mentee seeks help on personal issues.
- Lack of mentee technical or interpersonal skills.
- Mentee is unwilling to learn.
- Unforeseen or unexpected circumstances.

Tips to overcome obstacles:

- Make sure both you and the mentee expect some obstacles.
- Be prepared to promptly and properly deal with them.
- Be candid with the other partner if you are upset or struggling with some aspect of the relationship.
- Be prepared to discuss the nature of any problem, why it is an obstacle, and then work together to resolve the issue.

How should the mentoring relationship be ended?

When the mentor/mentee feels that the relationship is reaching its end, they should:

- Assess whether the relationship's goals have been reached.
 - Discuss how you each will use what you have learned from the mentoring relationship in the future.
 - Take stock of lessons learned, directions taken, and what is still needed to be accomplished.
 - Determine if the relationship should be extended.
 - Try to leave the relationship with positive feelings.
-