

WAKE FOREST  
UNIVERSITY

# MENTOR HANDBOOK



**MENTORING  
RESOURCE CENTER**

WAKE FOREST UNIVERSITY

## Contents

<b>Topic</b>	<b>Page</b>
<b>Introduction.....</b>	<b>3</b>
<b>What is Mentoring?.....</b>	<b>6</b>
<b>Forms of Mentoring.....</b>	<b>9</b>
<b>The Mentoring Relationship.....</b>	<b>10</b>
<b>Mentoring Learning Outcomes .....</b>	<b>15</b>
<b>Three Phases.....</b>	<b>17</b>
<b>The Beginning.....</b>	<b>17</b>
<b>Mentoring Relationship Agreement.....</b>	<b>20</b>
<b>The Middle.....</b>	<b>22</b>
<b>The End.....</b>	<b>30</b>
<b>Final Thoughts .....</b>	<b>31</b>
<b>Resources.....</b>	<b>32</b>

## Introduction

Welcome to mentoring at Wake Forest University! Mentoring relationships have always been a part of the Wake Forest experience; at its heart is the teacher-scholar ideal. In recognition of the unique opportunities provided by Wake Forest's small size, stature as a research university, and liberal arts foundation, the University has taken additional steps to ensure that effective mentoring relationships continue to be core to the Wake Forest experience. As part of the strategic plan, the University established the following overarching priorities:

1. Build exceptional faculty-student engagement
2. Sustain a tradition of opening new doors for educational opportunity
3. Reinforce the connections between the liberal arts and the professions
4. Educate the whole person – mind, body, and spirit – and help students find their place in the world

Mentoring, when done well, plays a key role in each of these priorities. Effective mentoring is an exciting opportunity to bring people together, to learn from one another, to network, to grow, and to develop personal and professional skills. And key to that developmental process is **you**, the mentor! So, on behalf of the entire Wake Forest community, **thank you** for agreeing to serve in this critically important role.

As part of the University's commitment to developing a vibrant mentoring culture on the Wake Forest campus, we have created the **Mentoring Resource Center** as part of the **Office of Personal and Career Development**. The Mentoring Resource Center serves as a central office for the entire Wake Forest community and provides guidance, resources, support, and recognition for Wake Forest mentoring relationships and programs. If at any point during your service as a mentor you need help, support, guidance, or feedback, please do not hesitate to contact us:

Mentoring Resource Center  
Reynolda Hall, Room 230  
Winston-Salem, NC 27109  
<http://mentoring.opcd.wfu.edu/>

**Assistant Vice President, Allison E. McWilliams ('95), Ph.D.**  
336.758.3741  
mcwillae@wfu.edu

**Associate Director, Lauren R. Beam ('07), MS, NCC**  
336.758.3078  
beamlr@wfu.edu

And, be sure to follow us on Twitter (@WFUmentoring) and subscribe to our e-newsletter (*Mentoring Minute*) for best practice information, resources, tips, and tools that you can use!

In the pages that follow you will find information, tips, and tools to assist you in your role as an effective mentor. It should be emphasized that even though mentoring can appear easy, it requires a complex and defined set of skills. In particular, mentoring requires

- Asking thoughtful and thought-provoking questions
- Practicing active listening
- Role-modeling behavior
- Providing objective feedback and guidance
- Demonstrating critical thinking
- Facilitating self-reflection and self-development
- Passion to support the growth of another person
- Time, energy, and enthusiasm

As you can already see, entering into a mentoring relationship is not a decision to be taken lightly! Take a moment to reflect on the following questions:

- How do you feel about being a mentor?
  
- What benefits would you gain from being a mentor?
  
- What would it cost you to be a mentor?
  
- Do you have time to mentor someone?
  
- Can you make a long-term commitment to this process?

You may find, after some careful consideration, that mentoring is not for you or that you do not have the time to invest in this sort of relationship right now. This is ok! It is far better to make that decision now, before the relationship begins, than to do so after you have started to build a relationship with your mentee.

Additionally, you should consider what support role you are being asked to provide as well as what role you see yourself playing in a specific developmental relationship. The following chart outlines various developmental models to help you (and your potential mentee) identify your role within the relationship.

<b>Mentor</b>	has more experience than you in that area in which you are interested in being mentored; willing to engage in a personal and purposeful relationship over a period of time; facilitates your growth and development
<b>Coach</b>	skilled in asking questions, listening, and encouraging you to work towards your goals; not required to have experience in the area in which you are interested in being coached; facilitates skill development, goal setting, and creating a plan of action
<b>Sponsor</b>	advocates for you, identifies opportunities and provides connections to those opportunities; promotes you to higher-ups for increased responsibility and advancement based on his or her personal political or organizational capital
<b>Accountability Partner</b>	will check in with you at agreed-upon points to ensure that you are staying on course with your work towards your goals
<b>Wise Counselor</b>	periodically provides advice and wisdom that may rise to the level of a “mentoring moment”; may also be called “advisor” or “guide”
<b>Networking Contact</b>	can suggest opportunities, provide introductions, and may pass along your resume but may not rise to the level of a “sponsor”

If you do decide to embark upon this journey, the potential rewards are tremendous. Those rewards include, but are not limited to

- Personal satisfaction and fulfillment
- Enhanced creativity
- Professional and personal rejuvenation
- Improved interpersonal and leadership skills
- Opportunity not only to make a difference in someone else’s life, but to have them make a difference in yours

Additionally, effective mentoring has considerable benefits, including:

- Increased clarity and satisfaction with one’s professional role
- Increased promotional rates and salaries
- Increased persistence to degree completion
- Higher GPA’s and educational aspirations
- Long-term well-being outcomes
- Greater likelihood to mentor others

So again, *thank you* for making this important commitment to our Wake Forest community. Let’s get started!

## What is Mentoring?

Before we look at what mentoring is, it's worth examining why mentoring is important for each of us. Mentoring is about personal growth and learning, but it's also about investing in other people, in terms of time, energy, and resources. Mentoring, in this sense, can be seen as a philosophy towards leadership and life.

We all serve as leaders in one capacity or another: of an organization, of a team, of our own lives. Tony Dungy, the Hall of Fame NFL football coach, wrote a book describing the key principles of mentor leadership as a philosophy. In that book, he notes that the question is not, will you have the opportunity to lead; rather, the question is **what type of leader will you be when that opportunity presents itself?**

The key to becoming a **mentor leader** is learning how to put other people first.

Mentor leaders: “seek to have a direct, intentional, and positive impact on those they lead. At its core, mentoring is about building character into the lives of others, modeling and teaching attitudes and behaviors, and creating a constructive legacy to be passed along to future generations of leaders.”

Mentor leaders ask themselves: How does my involvement in other people's lives have a **positive** and **lasting** influence and impact on them?

Sometimes this charge can seem like an overwhelming responsibility. But, as Dungy so eloquently reminds us, it can also be quite simple in execution:

**“Start right where you are,  
with the people right around you,  
doing something as simple as  
engaging with them and talking.  
Sometimes the smallest things we do  
have the biggest impact.**

**Just start.”<sup>1</sup>**

---

<sup>1</sup> Dungy, T., & Whitaker, N. (2010). *The mentor leader: Secrets to building people and teams that win consistently*. Winter Park, FL: Tyndale House Publishers, Inc.

Mentoring has a long history, dating back to Homer's *Odyssey*. In the story, when Odysseus, king of Ithaca, leaves to fight in the Trojan War, he entrusts the care and teaching of his son, Telemachus, to his friend, Mentor.

After the war, Odysseus wanders for 10 years, trying to return home. Eventually, Telemachus goes in search of his father and the goddess Athena assumes the form of Mentor to accompany Telemachus on his quest.

Over time, mentoring has evolved from a master-apprentice model, to a manager-protégé model, to a mentor-mentee model, with considerable responsibility on today's mentees to take ownership for creating developmental networks to support their learning and growth.

Take a moment and think about the word **mentor**. What words or images come to mind *for you*? Write them in the space provided below.

---

---

---

---

---

---

---

What does your answer above tell you about how you define effective mentorship?

---

---

---

---

---

---

---



At Wake Forest University, we define mentoring as:

*A purposeful and personal relationship in which a more experienced person (mentor) provides guidance, feedback, and wisdom to facilitate the growth and development of a less experienced person (mentee).*

Or, to put it another way: Mentoring is a developmental **relationship** based on **intentional** conversations.

Mentors ask: Where do you want to go, and how can I help you to get there?

### **Mentoring is...**

- a relationship in which the mentee takes **active responsibility** for his own learning and development, and the mentor serves as facilitator of that growth.
- a relationship built on the history, experience, and knowledge of **both partners**.
- a relationship in which the mentor **facilitates** the mentee's growth and development by asking thoughtful, thought-provoking questions, and providing feedback based on his or her experience.

### **Mentoring is not...**

- a relationship in which the mentee passively receives instruction from the mentor.
- a relationship in which the mentor tries to mold the mentee into a version of herself.
- a relationship in which the mentor solves the mentee's problems for him, or gives him all of the answers.

As educator Ernest Boyer<sup>2</sup> puts it:

*A mentor not only has a love of learning, but above all a love of students. A mentor directs rather than dictates, and offers guidance that inspires rather than smothers. A mentor respects students' urges to broaden their own vision of who they are and what they might become, and a mentor lives a life that embodies the beliefs that he or she espouses.*

<sup>2</sup> Kridel, C., Bullough, R. V., Jr., & Shaker, P. (Eds.). (1996). *Teachers and mentors*. New York: Garland Publishing, Inc., p. xii.



## Forms of Mentoring

Traditionally, mentoring is thought of as a one-to-one relationship, with the more experienced person mentoring the less experienced person. It used to be that these were hierarchical, authoritative relationships, with an older, more seasoned mentor picking out a younger mentee for development. Today, effective mentoring puts more emphasis on the relationship and the personal knowledge to be gained than on position, age, or status. Rather than identify one mentor per mentee, today we encourage mentees to identify multiple mentors to fulfill distinct roles. Further, as the concept of mentoring has developed, new forms have emerged, including:

- **Peer Mentoring:** mentor pairs are formed out of the same age group, experience level, or common interests.
- **Group Mentoring:** one individual serves as mentor to several mentees in a facilitated group; additionally, each of the individuals in the group (mentees) serve as peer mentors to one another.
- **Distance Mentoring:** a mentoring relationship that occurs over telephone, email, Skype, or other technology due to the fact that the mentoring partners are unable to meet in person. Distance mentoring requires particular attention to time, planning, and establishing ground rules as connections can be harder to form through this sort of mentoring.

**Formal mentoring** most often happens through structured mentoring programs. The program dictates the beginning and ending dates to the relationship, provides expectations for how often mentees are to meet with mentors, requires regular check-in points with a Program Coordinator, and offers a formal orientation or training session and often a formal closure to the program. Formal mentoring can also happen outside of the structures of a program when two individuals come to a formal agreement regarding expectations, goals, and boundaries and recognize that they are entering a mentoring relationship.

**Informal mentoring** happens without these structures in place. In fact, you may have benefited from informal mentoring in your life and not even realized it at the time. Often teachers, parents, clergy, coaches and even peers serve as informal mentors. An informal mentor is a more experienced person who takes an interest in a less experienced person's growth and development and sets out to purposefully guide that individual. An informal mentoring relationship is not part of a program or a formally structured relationship. However, informal mentoring pairs would do well to set clear expectations for the relationship, discuss developmental goals, and regularly check in with each other on progress towards those goals.

## The Mentoring Relationship

Take a moment and reflect on mentoring relationships you have experienced and then answer the following questions.

1. Who has served as a mentor for you in your life?

---

---

---

2. What did that person do for you? (*for example: guide, teach, answer questions*)

---

---

---

3. What worked well in that relationship?

---

---

---

4. What did not work well in that relationship?

---

---

---

5. What did that relationship teach you about being an effective mentoring partner?

---

---

---

## Roles and Responsibilities

No matter the stage or age of one's mentee, the mentor's role is not to solve the mentee's problems for him (or her). The mentor should help the mentee learn how to solve his own problems. Indeed, this is a key developmental process for those making the transition from high school, to college, to life after college.

The transition from adolescence to adulthood is a formative time in individuals' lives, when one discovers personal beliefs, interests, values, strengths, and goals. It is a time of change and exploration that is for many a period of great excitement and opportunity. But it also can present challenges that seem overwhelming and that can lead to debilitating or destructive behavior and poor decision-making. These *emerging adults*, a term that has been coined by the psychologist Jeffrey Arnett<sup>3</sup>, are neither fully adolescent nor fully adult and they are experiencing a period that is notable both for its exploration and for its instability. They have great optimism for the possibility to transform their lives, but at the same time they do not yet feel fully responsible for those lives.

As part of their developmental process, individuals must learn how to confront and to deal with challenges both big and small; indeed, by learning how to solve small problems we acquire the key skills and knowledge needed to solve the larger ones, which can include identity formation, selecting a career path, forming relationships, finding meaning and purpose, choosing values, and managing conflict. It is important to remember that the types of challenges confronted and the level of readiness to confront them will differ by individual.

It is our goal that every Wake Forest graduate acquire competency in these four areas:

1. Take ownership for choices and decisions
2. Set and pursue goals for personal and professional growth
3. Seek out feedback on goals, choices, and decisions
4. Intentionally reflect on learning and application

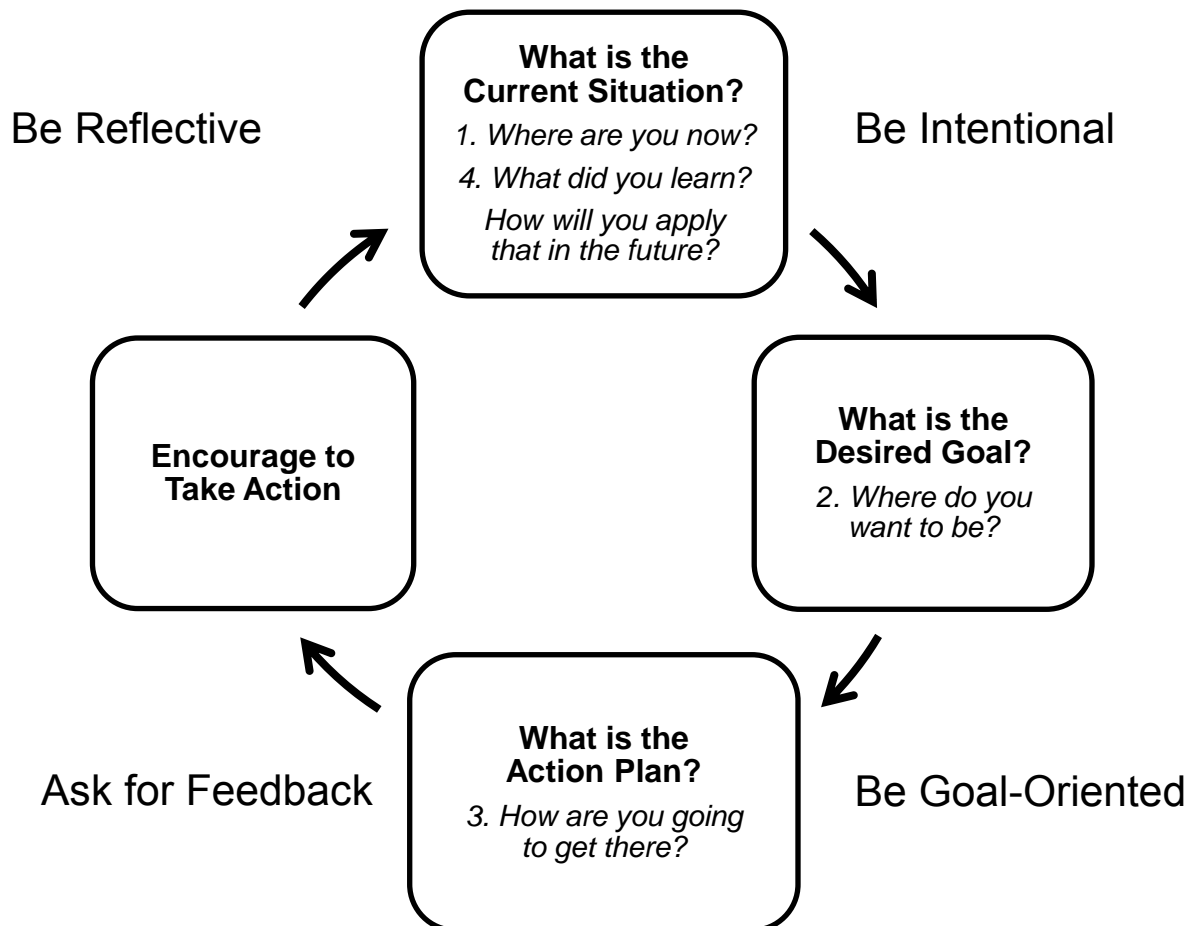
To help students and alumni develop these skills, use one of the following mentoring conversation models.

---

<sup>3</sup> Arnett, Jeffrey J. (2004). *Emerging adulthood: The winding road from the late teens through the twenties*. Oxford University Press.

An effective mentoring conversation is based on the principles of experiential learning, which is **learning** through **reflection** on **doing**. David A. Kolb, a professor of organizational behavior at Case Western Reserve University, is credited with developing the four-phase experiential learning cycle. At Wake Forest University, the mentoring conversation model is based on this cycle:

### Wake Forest University Mentoring Conversation Model



Although you do not have to use the exact words, you should use this model as a guide when you meet with your mentee. Ask your mentee:

- What has happened since we last met (where are you now)? What did you learn (from an experience, about yourself, about others, about a situation)? What will you do with this knowledge?
- What would you like to accomplish before we meet next (where do you want to be)?
- What steps do you plan to take to accomplish those goals (how are you going to get there)? What resources will you need? What barriers or challenges can you anticipate? How can I help you?

Another way to think about this is the **ABC Model of Mentoring**<sup>4</sup>:

1. **Acknowledge reality** – Before you jump in with advice or solutions, make sure that you fully understand the context of the situation, as well as the other person's experience or circumstances. Be aware of the temptation to apply your own experience, values, and knowledge to the other person's situation, or to jump to conclusions or assumptions.
  - What's going on with you?
  - What is the situation/problem/issue?
2. **Be strategic** – It's tempting to want to solve the other person's problems for her (or him) or to tell her exactly what to do. But if you do that, you will miss a huge learning opportunity: helping the other person learn how to solve her own problems! It's important that you focus on her goals, not yours.
  - What do you think is the cause?
  - What have you done so far?
  - What's worked? What hasn't?
  - What result do you want?
  - What could you do to get that result?
  - How can I help you to be successful?
3. **Commit to action** – Help the other person develop a plan of action, and then follow-up. Tell her that you will be checking in to see if she is doing what she said she would do. Keep her accountable and also build trust in the relationship by keeping your commitments.
  - When will we check in with each other on your progress?

---

<sup>4</sup> Sanft, M., Jensen, M., & McMurray, E. (2008). *Peer mentor companion*. Belmont, CA: Wadsworth, Cengage Learning.

Mentoring is both about reflecting on what has occurred and what was learned, and creating developmental stepping stones to encourage further development and reflection. You should be aware that it's possible your mentee has never been asked questions like these before, and it may take some time before she knows how to answer or how to express what she needs and wants. By asking thoughtful questions and providing feedback (two mentoring skills we will discuss shortly), you will help your mentee learn how to have these types of conversations and in the process you will help her gain important skills of decision-making, problem solving, and critical thinking, which she will use throughout her life.

## Mentoring Learning Outcomes©

As a mentor, you should develop and use skills that will aid in your mentee's growth and development. The following Mentoring Learning Outcomes outline the skill sets *you* should work to develop during a mentoring relationship along with strategies to achieve each learning goal.

<b>Mentor Learning Outcomes:</b>	<b>Strategies:</b>
<p><b>1. Build and support effective relationships</b> Actively creates supportive, intentional relationship based on mutual trust, respect, and accountability that creates a safe space for the mentee to work towards personal learning goals. Willingly discloses personal stories and lessons learned through experience. Seeks out opportunities for intentional conversations that support the growth of the mentee. Role models expected behavior for effective relationships.</p>	<ul style="list-style-type: none"> <li>- Share your story – be willing to disclose your past and current experiences and future goals</li> <li>- Maintain confidentiality – build trust by honoring others' stories as your own</li> <li>- Seek opportunities for intentional conversations – understand your mentee's goals and create learning moments to support his or her progress</li> <li>- Role model behavior - do what you say you will do, show up, be punctual, be present, practice active listening</li> </ul>
<p><b>2. Provide objective guidance and feedback based on personal experience</b> Facilitate mentee's ability to create and work towards specific learning goals by providing objective feedback and guidance on goals and action steps, sharing lessons from personal experience, and serving as a connector to people and resources.</p>	<ul style="list-style-type: none"> <li>- Be mentee-focused – develop relationship around mentee's specific learning goals</li> <li>- Provide objective feedback – focus on concrete actions and behavior in order to support mentee growth and development</li> <li>- Share personal experience – openly disclose past and current experiences, successes, challenges, and lessons learned</li> <li>- Be a connector – connect mentee to people and resources that support his or her progress towards goals</li> </ul>
<p><b>3. Facilitate reflective thinking</b> Pushes mentee to reflect on experiences by asking thoughtful, thought-provoking questions that seek deeper meaning and help the mentee to become more self-aware of strengths and growth opportunities. Seeks out opportunities for intentional conversations that support the growth of the mentee.</p>	<ul style="list-style-type: none"> <li>- Ask thought-provoking questions – ask open-ended questions that support mentee learning</li> <li>- Ask reflective questions – routinely ask mentee to reflect on what he or she is learning from actions and experiences</li> <li>- Provide objective feedback – focus on concrete actions and behavior in order to support mentee growth and development</li> <li>- Seek opportunities for intentional conversations – understand your mentee's goals and create learning moments to support his or her progress</li> </ul>
<p><b>4. Take ownership for own personal growth and learning</b> Serve as a role model for personal growth and learning by employing practices of goal-setting, seeking feedback, and reflection for one's own development during the mentoring relationship.</p>	<ul style="list-style-type: none"> <li>- Create SMART goals – write 2-3 developmental goals to achieve during the relationship using the SMART goal framework</li> <li>- Identify action steps – write 2-3 concrete action steps for each goal statement</li> <li>- Share progress – regularly share progress towards goals and ask for feedback on next steps</li> <li>- Reflect and re-set – periodically reflect on progress and lessons learned in order to set new goals</li> </ul>



We have a separate list of Mentoring Learning Outcomes for mentees, available on our website. We encourage both mentors and mentees to use our Beginning/Mid-Year and End-of-Relationship Self-Evaluation Forms to assess progress towards these Mentoring Learning Outcomes and identify opportunities for growth. These forms can be found on the Mentoring Resource Center website here: <http://mentoring.opcd.wfu.edu/develop-your-mentoring-skill-set/>.

Finally, in addition to these skills, mentors need to have the time, enthusiasm, and energy to dedicate to the relationship. Mentoring should not be confused with friendship, coaching, counseling, or a “buddy” program, even though mentors may adopt each of these roles at certain points during the mentoring relationship depending on the needs of the mentee. Mentoring is both personal and purposeful. Recall the Wake Forest mentoring definition:

***A purposeful and personal relationship in which a more experienced person (mentor) provides guidance, feedback, and wisdom to facilitate the growth and development of a less experienced person (mentee).***

Research and best practice demonstrate that the most effective mentoring relationships happen between partners who are willing to invest in each other, consistently and over an extended period of time. These are developmental relationships based on intentional conversations. These relationships develop over the course of three distinct phases, each of which we will discuss next.

## Three Phases

Mentoring relationships, when they are managed effectively, have three distinct phases that each require different focus of attention:

1. **The Beginning** – in this phase the mentoring pairs work on getting to know one another, set goals for the relationship, agree on commitments and expectations.
2. **The Middle** – in this phase the mentor pairs go through an ongoing process of setting mentee goals, creating an action plan, taking action, and reflecting on outcomes. It is a period of sustained growth and relationship development.
3. **The End** – in this phase the relationship must be redefined. The relationship and achievements are evaluated and accomplishments are celebrated.

Even in informal relationships, it's important to pay attention to these three phases and how you and your mentee are intentionally engaging with each other.

## The Beginning

The beginning of a mentoring relationship is the time to set expectations. At your initial meeting, take some time to get to know each other. Some topics for discussion:

- Discuss your backgrounds and histories.
- Share any previous mentoring experiences you each might have had, and talk about what was learned from that.
- Talk with your mentee about her (or his) goals. What does she want to get out of this relationship? Some potential areas to focus on:
  - Developing academic skills related to critical thinking, setting priorities, taking personal intellectual responsibility
  - Developing professional expertise in a specific area of focus
  - Working on a specific academic goal such as a research project or developing a grant proposal
  - Establishing interpersonal relationships
  - Developing a personal identity based on values and beliefs
  - Developing personal independence
  - Developing leadership abilities
  - Exploring opportunities to expand comfort zone (through study abroad, for example)
  - Increasing self-confidence and self-esteem
  - Exploring personal interests and abilities

- Building confidence and learning to take risks
  - Learning resiliency – how to handle difficult times and to bounce back
  - Learning how to handle school-life-work balance
  - Learning how to maintain health and well-being
  - Exploring future career paths and opportunities
  - Exploring opportunities to contribute to the community
- Share your goals for the mentee and for the relationship as well. What would you like for the mentee to get out of this relationship? What would *you* like to get out of this relationship?

Clearly-defined expectations should be established for your mentoring relationship:

- How often you will meet and where will these meetings take place?
- Who will make the arrangements for the meetings?
- What will be your “ground rules” for how the time will be spent? Who runs the meetings? Do you expect your mentee to bring an agenda to each meeting?
- What will be your “ground rules” for how you will communicate?
- How you will know when the relationship should be brought to closure?
- What does confidentiality mean to you and what does it mean to your mentee? Will your conversations be kept confidential?
- What topics are off-limits?
- How will you respect one another’s time?
- Are you always “on” as mentoring partners, or just when you meet?

It is important to set these expectations up-front, in order to avoid any confusion or stumbling blocks down the road. The most frequent cause for mentoring relationships fizzling out is a lack of communication around expectations.

At a minimum the following are expectations for formal mentoring partners at Wake Forest.

**Expectations of the mentor include:**

- Be available – mentor pairs should make meaningful contact at least every other week (two times per month)
- Be present – set aside other commitments during your time with your mentee
- Be engaged – provide feedback, advice, and guidance
- Coach proactively – gently push the mentee to take action

**Expectations of the mentee include:**

- Honor your commitments – show up for meetings, on time, or reschedule with appropriate advance notice when necessary
- Be open – to feedback and guidance provided by your mentor
- Be engaged – participate fully in the relationship from beginning to end
- Take initiative – consider options, ask questions, be willing to take risks

We recommend that you and your mentee together develop a written agreement for the relationship. Revisit the mentoring agreement periodically with your mentee to remind yourselves of your commitments and to make sure they are still appropriate. Update the agreement if necessary.

A sample mentoring agreement is included on the following page as well as a blank one for your use.

## Wake Forest University Mentoring Relationship Agreement

We have agreed to the following goals:

1. Develop personal support network of faculty, staff, and peers by the end of the year.
2. Identify and explore personal interests and abilities through classwork and out-of-class activities during the academic year. \_\_\_\_\_
3. Increase understanding of personal responsibility for academic outcomes. \_\_\_\_\_

The mentoring partnership is scheduled to last until:

\_\_May 2018\_\_\_\_\_

Additionally, we agree to the following:

1. Meeting Schedule:

Every other Tuesday from 11 am - 12 pm in Starbucks \_\_\_\_\_

2. Responsibility for setting meetings:

Meetings are set for the year \_\_\_\_\_

3. Ground Rules for the Relationship:

1. Keep to meeting schedule; 2. 1 week's notice to reschedule if necessary;

3. Conversations will be kept confidential, unless there is danger for harm; 4. We will be open, honest, and willing to take risks. \_\_\_\_\_

4. Provide regular feedback to each other by:

In person, at the end of each meeting. \_\_\_\_\_

We agree to assess the progress of the relationship on the following date: \_\_January 2018\_ as well as at the scheduled conclusion of the partnership. At that time we may enter into a new mentoring agreement if both partners agree to it. If we decide to end the partnership prior to the scheduled conclusion, we will do so with appropriate closure.

\_\_\_\_\_  
Mentor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Mentee

\_\_\_\_\_  
Date

**Wake Forest University**  
**Mentoring Relationship Agreement**

We have agreed to the following goals:

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_

The mentoring partnership is scheduled to last until:

\_\_\_\_\_

Additionally, we agree to the following:

1. Meeting Schedule:

\_\_\_\_\_

2. Responsibility for setting meetings:

\_\_\_\_\_

3. Ground Rules for the Relationship:

\_\_\_\_\_

\_\_\_\_\_

4. Provide regular feedback to each other by:

\_\_\_\_\_

\_\_\_\_\_

We agree to assess the progress of the relationship on the following date: \_\_\_\_\_  
as well as at the scheduled conclusion of the partnership. At that time we may enter into a new mentoring agreement if both partners agree to it. If we decide to end the partnership prior to the scheduled conclusion, we will do so with appropriate closure.

\_\_\_\_\_  
Mentor Date

\_\_\_\_\_  
Mentee Date

## The Middle

The bulk of your relationship with your mentee will be spent in “the middle.” This is the period where you will become extremely familiar with your mentee, and you will draw upon your experiences, knowledge, and resources to guide and facilitate her growth and development. In the next few pages are some tips for working with your mentee during this developmental phase.

Once you have come to an agreement on roles and expectations, it is time for your mentee to set some goals and to develop an action plan for achieving them. Goals should be both a stretch, something inspiring to work towards that may require new skills or the use of different “intellectual muscles,” but also focused enough that the mentee can achieve them.

Goals may be personal (for example: developing personal independence), academic (for example: establishing a relationship with a faculty member in a subject area of interest), or professional (for example: developing leadership experience) in nature. Goals should also change over time. For some, setting goals first will help to set the tone for the relationship. For others, time first spent relationship-building will help to facilitate the process of setting goals.

When writing goals, help your mentee to use the SMART goal model. Goal statements should be:

**Specific** – The goal statement should be concrete and action-oriented. What, specifically, is the mentee trying to accomplish? Ask: what do you mean by that? Are there ways to restate the goal to remove any misunderstanding? Does the goal start with an action verb (for example: develop, improve, create)?

**Measurable** – How will the mentee know when she has achieved the goal? How will she track and measure progress? How does she define success?

**Achievable** – The goal should require work, but be attainable. Is the goal too big (for example, “travel to outer space” is probably too big of a goal for a first-year student) or too limited (for example, “make dean’s list” probably does not require much work for a consistently straight-A student)?

**Realistic** – Does the mentee have the ability and commitment to reach the goal? What additional resources, of time, money, or capability, will be needed for her to reach the goal? Does the goal set her up for failure from the outset?

**Timely** – There should be a specific time-frame for achieving the goal which will keep your mentee accountable.



Let's look at an example. *Have a good first year at Wake Forest* is not a SMART goal. It is a goal, certainly, but let's examine it in terms of the SMART goal model.

**Is it specific?**

Not really. What is meant by “good”? And, “have” is not an action-oriented verb. What is it specifically that the mentee is trying to achieve?

**Is it measurable?**

Not as it is written. How will the mentee know when she has achieved that goal? How will she measure her success?

**Is it achievable?**

Potentially, but without specifics, it is hard to determine.

**Is it realistic?**

Again, potentially, but lacking specifics it is hard to determine.

**Is it timely?**

Yes. It is focused on the first year of school.

Now let's look at another example. *Develop a personal support network of faculty, staff, and peers by the end of my first year at Wake Forest* is a much better goal. Now the mentee can write out an action plan to achieve that goal, including action steps. A sample action plan is included below.

**Mentoring Action Plan**

**Goal:** *Develop a personal support network of faculty, staff, and peers by the end of my first year at Wake Forest*

**Action Steps**

1. Identify and meet with 2-3 faculty members outside of classes to discuss and receive feedback on my academic and personal interests each semester
2. Identify and meet with 2-3 staff members to discuss extracurricular and personal interests and challenges each semester
3. Identify and join at least 1 social club or organization by the end of the year

Once your mentee has developed goals and action steps, use this plan to guide your mentoring conversations. What is she learning about herself through the process of pursuing these goals? What challenges is she encountering, and how should she overcome these? As she accomplishes her goals, discuss whether new goals should be set. And remember that goals don't need to be vision statements. Think in no more than six months to one year increments.

While the goal-setting process is important for accomplishing tangible results, of equal importance is what your mentee is learning from going through the process. As John

Maxwell notes, “the greatest achievers in life are people who set goals for themselves and then work hard to reach them. What they *get* by reaching the goals is not nearly as important as what they *become* by reaching them.”<sup>5</sup> Don’t miss out on these key opportunities for conversations and learning with your mentee!

Additional tips for this middle phase of the mentoring relationship can be found on the pages that follow.

---

<sup>5</sup> Maxwell, J.C. (2008). *Mentoring 101*. Nashville, TN: Thomas Nelson.

### **Tips – Building the Relationship**

Below are some conversation starters for you and your mentee:

- Write down your assumptions about mentors, mentees, and mentoring relationships and have your mentee do the same. Use that information to discuss expectations, ground rules, and boundaries for the relationship.
  
- Ask your mentee to develop a personal vision statement:
  - Take some time alone, and think about where he (or she) is five years from now. There are no limits, anything is possible.
  - What is the mentee doing?
  - What contributions is he making?
  - What are people saying about the mentee?
  - What impact is he having?
  - In what ways has the mentee grown or developed?

Ask the mentee to write out this vision, in paragraph form, and bring it to your next meeting to discuss. Use that discussion to develop short-term goals and an action plan.

- After developing goals and an action plan, develop a list of potential learning opportunities. These might include identifying upcoming speakers, cultural events, networking opportunities, a book to read, or classes to attend.
  - What on this list can you and your mentee do together?
  - How will you both prepare beforehand?
  - How will you reflect on and debrief each of the learning opportunities once they are completed?
  - How do they relate to the mentee's goals and action plan?

### **Tips – Building the Relationship**

Below are some reminders of best practices for your relationship with your mentee:

- Set a regular meeting schedule and stick to it.
- Use the Mentoring Conversation Model to guide your conversations with your mentee: where are you now, where do you want to be, how are you going to get there, and what did you learn.
- Revisit the goals, action plan, and the mentoring relationship agreement on a regular basis to make sure that the relationship is still on track, and that they are still appropriate. If you need to update them mid-way through the relationship, that is ok.
- Take time after each mentoring meeting to reflect on your own development. Keep a journal.
- Be aware that this relationship, like all relationships, will take time to grow and develop.
- Look for and offer multiple learning opportunities to your mentee. Do not be discouraged if he (or she) does not agree to participate in all of them. But if he agrees to participate and then does not follow through, use this as a learning moment to discuss why he made that choice.
- Provide ongoing feedback to your mentee, and ask for ongoing feedback from your mentee.
- Practice role modeling behavior.

**Tips – Topics for Conversation**

In addition to discussing the mentee's progress towards goals, the following are great topics for conversation with your mentee. Discuss how you each define them and how you incorporate them into your daily life. Look for examples – in current events, in your own life – to demonstrate each of the principles in action:

- Personal and Professional Ethics and Values
- Integrity and Character
- Leadership – Definition, Styles, Examples
- Time Management and Prioritization
- School/Life/Work Balance
- Establishing Healthy Behaviors and Habits
- Making Choices
- Gender and Diversity Issues
- Understanding the World of Work
- Understanding the World of Wake
- Networking
- Discipline/Expectations
- Personal Responsibility and Accountability
- Professional Polish
- Establishing Personal Credibility
- Appropriate/Inappropriate Behaviors
- Organizational Citizenship

## Tips – Stumbling Blocks

You may run into various stumbling blocks during the course of your mentoring relationship. The following are a few possibilities:

1. **Mentees who want a lot of your time** – having clearly set ground rules for access and meetings will help with this. Also be wary of being the “go-to” person for all of your mentee’s issues and questions. You are his (or her) mentor. You are not his priest, therapist, tutor, doctor, parent, or best friend. **If you suspect that your mentee needs additional assistance, contact the following:**

**University Counseling Center – 336.758.5273, [counselingcenter.wfu.edu/](http://counselingcenter.wfu.edu/)**

**Student Health Service – 336.758.5218, [shs.wfu.edu/](http://shs.wfu.edu/)**

**Office of the Chaplain – 336.758.5210, [chaplain.wfu.edu/](http://chaplain.wfu.edu/)**

**Learning Assistance Center – 336.758.5929, [lac.wfu.edu/](http://lac.wfu.edu/)**

2. **Mentees who fail to follow-through** – having clearly stated goals for each session with your mentee will help with accountability. You may need to have a conversation with your mentee about adjusting his approach to accomplishing goals that is more in line with his style of learning. Or you may need to revisit the goals and vision statements to determine whether they are accurate reflections of where the mentee wants to be.
3. **Mentees who do not seem committed to the relationship** – revisit the goals and the ground rules set in the relationship. Does the mentee understand what is expected of him? Do the goals need to be changed? Does the relationship need to end, for now?
4. **Mentors who try to be all things to their mentee** – be aware and honest about your limitations. Manage expectations for your mentee about what you do and do not know. Setting up the expectation that you can be and do all things can lead to disappointment, burnout, and frustration.
5. **Mentors who feel stress or who are procrastinating** – one of the greatest stumbling blocks in any mentoring relationship is time. You must make adequate time for the relationship. If you constantly reschedule meetings or cut short time with your mentee, you need to reassess your commitment to this relationship. Your mentee may be better served being mentored by someone else.

Finally, a note about cultural sensitivities. Wake Forest, just like other institutions, is an increasingly diverse and interconnected place. This diversity provides opportunities for augmented learning and widening our viewpoints, but it also provides opportunities for real stumbling blocks in a mentoring relationship. We all see the world in different ways; when there are cultural differences this is particularly true. We each bring our own history, experiences, and knowledge to any relationship, and these things affect the way that we see the world. It is important that we all become more culturally self-aware.

- Ask yourself: what are my potential biases towards other people's cultural values?
- If your mentee is from a different background than your own, see this as an opportunity to develop an appreciation for the other person's culture.
- Rely on your communication skills; pay particular attention to the importance of active listening.
- Avoid using language that will stereotype or that will exclude.
- Be aware of religious issues or practices, implications of non-verbals, and different interpretations of time that may be the result of different cultural norms.

If you have specific questions or concerns about cultural differences, contact the Intercultural Center (336.758.5864, [interculturalcenter.wfu.edu/](http://interculturalcenter.wfu.edu/)), the Center for Global Programs and Studies (336.758.5938, [global.wfu.edu/](http://global.wfu.edu/)), and the Office of Diversity and Inclusion (336.758.3824, [diversity.wfu.edu/](http://diversity.wfu.edu/)).



## The End

The end of the mentoring relationship is the time for reflection on the wisdom gained during the relationship. It is an opportunity to harness all that was learned and to push both you and your mentor forward towards new goals and action. It is a time for a final, formal mentoring conversation, to reflect on all that you have learned and to discuss how you both will use that new knowledge in the future. Additionally, it is time to redefine the relationship with your mentee and to set new ground rules and boundaries for your future interactions.

We encourage both mentors and mentees to use our End-of-Relationship Self-Evaluation Forms to assess progress towards the Mentoring Learning Outcomes and to identify future opportunities for growth. These forms can be found on the Mentoring Resource Center website here: <http://mentoring.opcd.wfu.edu/develop-your-mentoring-skill-set/>.

It is especially important that you and your mentee celebrate what you have done together! If you are not part of a formal mentoring program, or if your mentoring program does not provide a final celebratory event, create one of your own. Find a speaker to go see together, go to a meal, take some time to acknowledge in words and in person what the two of you have accomplished together.

Learning how to bring closure to a relationship is another opportunity for growth for your mentee. There will be numerous times in his future when he (or she) will have to experience the end of relationships, both personally and professionally. Learning how to do so with grace and respect is yet another tool in his tool kit as he moves forward. This is true even if the relationship has to end earlier than expected. No matter what, if either you or the mentee decides to leave the relationship prematurely, the other must respect that decision. But do so by bringing appropriate closure to the relationship.

Note that the end of a formal mentoring relationship does not necessarily mean the end to your relationship with your mentee. Rather, you are transitioning to a new relationship, one that hopefully will continue for years to come.

## Final Thoughts

Mentoring relationships are wonderful opportunities for growth and development, expanding perspectives, learning new skills and abilities, taking risks, and discovering new frontiers. When done well, a mentoring relationship truly can have life-changing effects. It is our goal that, by developing and supporting a mentoring culture at Wake Forest, one day all of our interactions will be based on a purposeful interest and concern for one another's personal paths.

That being said, do not feel that you are in this relationship alone! Although mentoring is traditionally conceived of as a partnership between two people, there are a vast array of resources here at Wake Forest available to guide and support you. Do not hesitate to contact the Mentoring Resource Center for assistance. Additionally, there are many books and online resources that you may find useful; a few are listed on the following page and additional support can be found at the Mentoring Resource Center website. Again, thank you for making this valuable and valued contribution to the Wake Forest community. You truly are making a difference!

## Recommended Resources

Dungy, T., & Whitaker, N. (2010). *The mentor leader: Secrets to building people and Teams that win consistently*. Winter Park, FL: Tyndale House Publishers, Inc.

International Mentoring Association. <http://mentoringassociation.org/>

Johnson, W. B. (2007). *On being a mentor: A guide for higher education faculty*. New York, NY: Lawrence Erlbaum Associates.

Johnson, W. B., & Ridley, C. R. (2008). *The elements of mentoring*. New York, NY: Palgrave Macmillan.

Maxwell, J.C. (2008). *Mentoring 101*. Nashville, TN: Thomas Nelson.

McWilliams, A. (2017). *Five for your first five: Own your career and life after college*. Winston-Salem, NC: Library Partners Press.

Meggison, D., & Clutterbuck, D. (2005). *Techniques for coaching and mentoring*. Oxford, UK: Elsevier Ltd.

Meggison, D., & Clutterbuck, D. (2009). *Further techniques for coaching and mentoring*. Oxford, UK: Elsevier, Ltd.

Mentor. <http://www.mentoring.org/>

Mentoring Works. <http://mentoring-works.com/>

Newton, F.B., & Ender, S.C. (2010). *Students helping students: A guide for peer educators on college campuses* (2nd ed.). San Francisco, CA: John Wiley & Sons.

Sanft, M., Jensen, M., & McMurray, E. (2008). *Peer mentor companion*. Belmont, CA; Wadsworth, Cengage Learning.

Shea, G. F. (2002). *Mentoring: How to develop successful mentor behaviors*. Menlo Park, CA: Crisp Learning.

Stanfield, R. B. (Ed.). (2000). *The art of focused conversation*. Canadian Institute for Cultural Affairs.

The Chronicle of Evidence-Based Mentoring. <https://chronicle.umbmentoring.org/>

Zachary, L. J. (2000). *The mentor's guide: Facilitating effective learning relationships*. San Francisco, CA: Jossey-Bass, Inc.

**Wake Forest University  
Mentoring Resource Center  
Reynolda Hall, Room 230  
Winston-Salem, NC 27109**

**Assistant Vice President, Allison E. McWilliams ('95), Ph.D.  
336.758.3741  
mcwillae@wfu.edu**

**Associate Director, Lauren R. Beam ('07), MS, NCC  
336.758.3078  
beamlr@wfu.edu**

**<http://mentoring.opcd.wfu.edu/>  
@WFUmentoring**

