

# MENTORING TOOLKIT

## MAKING THE MOST OF MENTORING RELATIONSHIPS

*No matter what stage of academia, scholars not only need mentors but they may also be asked to mentor others. This toolkit is designed to examine what may be expected of you in either the mentee or mentor role as you navigate mentoring relationships.*

By the ADVANCE Office of Faculty Development and the PhD Network

# REQUESTING MENTORSHIP EMAIL TEMPLATE

Reaching out to potential mentors can be difficult, especially if there is not an already established relationship.

While most mentoring relationships do not form through emails, COVID-19 has limited traditional networking opportunities. Before reaching out via email, consider other avenues to engage with potential mentors such as LinkedIn, virtual seminars hosted by your department or college, or interdisciplinary virtual conferences.

Dear Dr./Professor [FACULTY NAME],

My name is [FIRST & LAST NAME] and I am a [ROLE AT UNIVERSITY] studying [FIELD OF STUDY] at Northeastern University. I am interested in becoming a [JOB TITLE], and I believe that your work in [FOCUS OF WORK] greatly aligns with my interest in [AREA OF INTEREST]. I am particularly interested in [INSERT WHAT YOU HOPE TO GAIN], and feel you would be an ideal mentor for me because of your experience with [EXPAND ON WHY YOU CHOSE THEM]. Could I ask for 30 minutes of your time over coffee or lunch to meet? I can be reached [INSERT TIMES OF AVAILABILITY] at [PHONE NUMBER] or by email at [EMAIL]. Thank you for your time and consideration.

I look forward to hearing from you soon,

[FIRST NAME & LAST NAME]

**Include a copy of your most recent résumé/CV.**

**Feel free to check in two to three weeks after your initial contact, but after that it is time to focus on other potential mentors.**

## 02

# NATIONAL CENTER FOR FACULTY DEVELOPMENT & DIVERSITY (NCFDD)

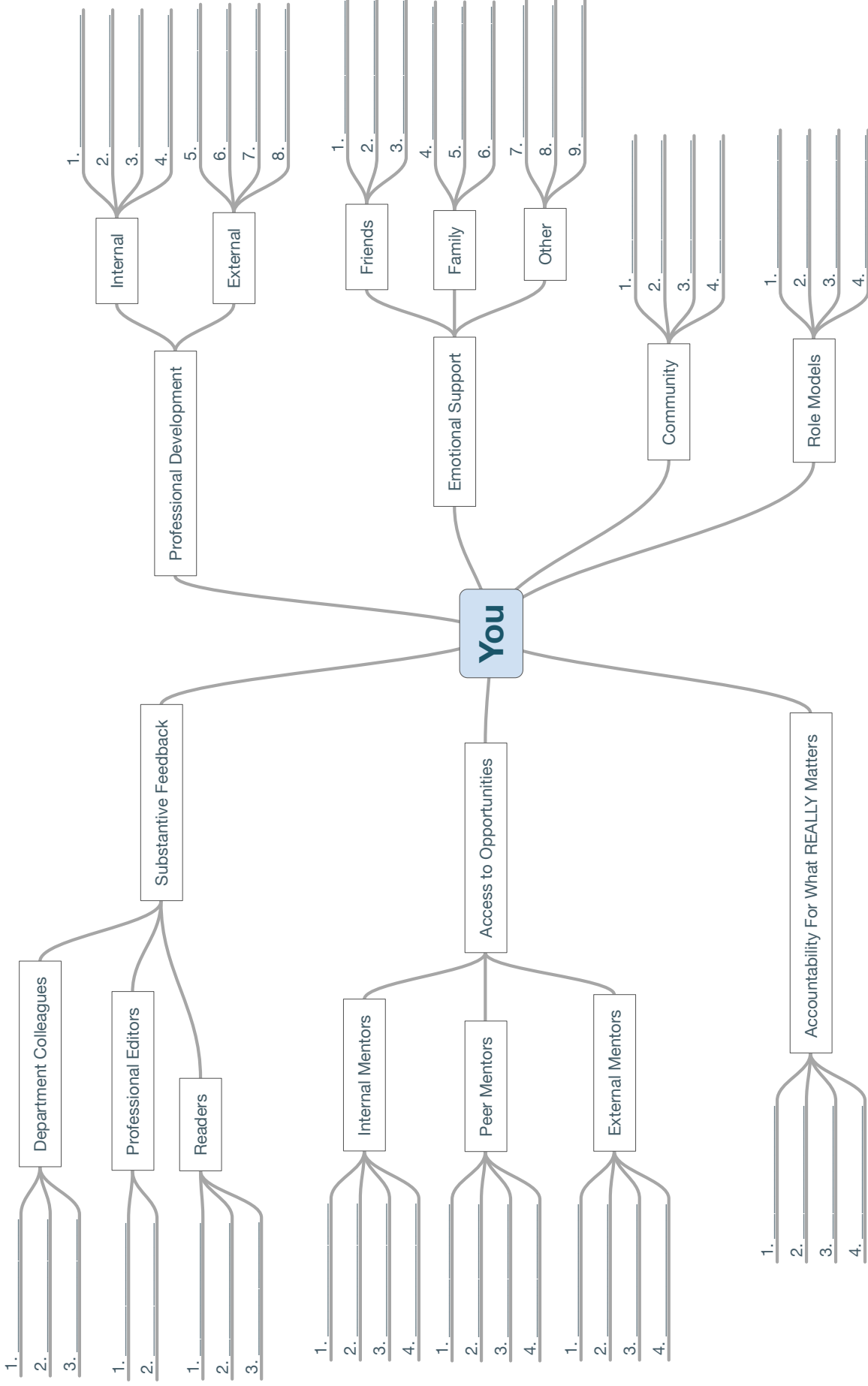


The National Center for Faculty Development & Diversity has an extensive resource library for graduate students and faculty of all ranks. Sign up for your sponsored institutional account here: <https://www.facultydiversity.org/join>.

Rarely can one person provide all types of support and guidance to mentees. Mentoring can come in many forms such as a formal mentoring relationship or peer mentoring groups. For example, an international scholar may want to discuss navigating expectations in the United States with a peer mentor who may have the same experiences, rather than with a faculty mentor.

Fill in your network map on the next page with individuals who you can see as mentors in each category to build a community of support.

# NCFDD Mentoring Map



## 03 QUESTIONS TO ASK FACULTY MENTORS

Here are some questions to consider when beginning and maintaining a mentoring relationship.

1. What are the mentor's expectations for mentees?
2. Are there opportunities to practice grant-writing, teaching, mentoring, oral presentations, and reviewing manuscripts?
3. How to identify graduate and undergraduate students for your research?
4. How to find funding opportunities?
5. How to prioritize research, teaching, and service?
6. Learning the art of saying no.
7. What/where/how much to publish.
8. How much time to spend on projects, course preparation (general time management skills).

## REFLECTING ON THE "RIGHT FIT"

If working with a research group or peer mentoring group, explore what group dynamics will fit with your professional goals and personality. Think about the characteristics you value in the chart below. Then consider how those traits may be similar or different from what you would look for in a primary mentor.

### GROUP DYNAMICS

- *Example: Cooperation*
- *Example: Accountability*

### PRIMARY MENTOR

- *Example: Identification of networking opportunities*
- *Example: Willingness to discuss future career aspirations*

## 04 MENTORING UP

Learn how to proactively engage with your mentor(s). Use the table below to brainstorm how you might engage in mentoring up and to receive the level of support you need. For example, to align expectations with a new mentor at the beginning of the relationship, you could offer to share examples of mentoring agreements so that you and your mentor can create one that works for you.

Topic	I can more effectively “mentor up” if I.....
General Strategies	
Maintaining Effective Communication	
Aligning Expectations	- <i>Example: Create and share a mentoring agreement</i>
Finding Work/Life Balance	
Addressing Equity and Inclusion	
Building Self-Efficacy	
Navigating Professional Development	

## HOW CAN YOU SUPPORT YOUR MENTEE(S)

### Some guidelines to keep in mind.

- Don't make assumptions about what your mentees need. Ask them.
- Set clear expectations.
- Check in with your mentee regularly. Make sure to define how often the two of you would like to meet.
- Learn how to give and receive feedback effectively, and teach your mentees these skills.
- Understand the power of words. What you say to your mentees carries different weight than if it were said to them by a peer. Be mindful of when and what you say.
- Discuss long-term and short-term career goals in terms of teaching, research/scholarship, and service.
- Recognize the limits of your own research and experience. Consider recommending that your mentee expands their network with mentors in areas you may have less knowledge.
- Connect your mentee with campus resources that they may find helpful.

## QUESTIONS FOR SETTING EXPECTATIONS

**It is important to set milestones when beginning a mentoring relationship. Ask yourself the following questions to guide how you envision your mentee progressing and tell them what expectations you are setting.**

- What would success for your mentee look like to you? What would you like them to achieve by the end of their first year?
- What is your mentoring approach?
- What role will you play in the development of your mentee's writing and communication skills?



## EXAMPLE OF MENTORING RELATIONSHIP AGREEMENT

Contributed by E. Frazier, C. Pfund, and A. R. Butz with information from Branchaw, Pfund, and Rediske. (2010). *Entering Research: A Facilitator's Manual*. New York: W.H. Freeman & Co.

Mentoring relationships agreements are an important tool for beginning the partnership with a set of clear expectations for both the mentor and mentee. It can be used to define regular meeting times, career goals, and explanations of work flow and receipt of feedback. Both mentor and mentee should continue to refer back to this document throughout the relationship to ensure that they are following the agreement and to discuss if any aspects need to be updated.

As this example focuses on a mentoring relationship for undergraduates in STEM, consider what areas of the agreement may need to be altered or added in order to fit with your field of study and career status.

Work with your mentee to craft an agreement that works for the two of you.

## MENTOR–UNDERGRADUATE TRAINEE EXPECTATIONS AGREEMENT

Trainee (print) \_\_\_\_\_ Mentor (print) \_\_\_\_\_

This agreement outlines the parameters of our work together on this research project.

1. Our major goals are:
  - A. proposed research project goals –
  - B. trainee’s personal and/or professional goals –
  - C. mentor’s personal and/or professional goals –
2. Our shared vision of success in this research project is:
3. We agree to work together on this project for at least \_\_\_\_\_ semesters.
4. The trainee will work at least \_\_\_\_\_ hours per week on the project during the academic year, and \_\_\_\_\_ hours per week in the summer.
5. The trainee will propose their weekly schedule to the mentor by the \_\_\_\_\_ week of the semester.  
If the trainee must deviate from this schedule (e.g., to study for an upcoming exam), then they will communicate this to the mentor at least \_\_\_\_\_ (weeks/days/hours) before the change occurs.
6. On a daily basis, our primary means of communication will be through (circle all that apply):  
face to face/phone/email/instant messaging/ \_\_\_\_\_
7. We will meet one-on-one to discuss our progress, the larger project goals, and to evaluate the trainee’s performance in the lab. We will reaffirm or revise our goals and/or expectations going forward for at least \_\_\_\_\_ minutes \_\_\_\_\_ time(s) per month.
  - a. (Circle one): It will be the (trainee’s/mentor’s) responsibility to schedule these meetings.
  - b. In preparation for these meetings, the trainee will:
  - c. In preparation for these meetings, the mentor will:
8. At these meetings, the mentor will provide feedback on the trainee’s performance and specific suggestions for how to improve or progress to the next level of responsibility through a
  - a. written evaluation
  - b. a verbal evaluation
  - c. other \_\_\_\_\_
9. When learning new techniques and procedures, the mentor will train the trainee using the following procedure(s) (write out directions, hands-on demonstration, verbally direct as trainee does the procedure, etc.):
10. The proper procedure for documenting research results (laboratory notebook) in our research group is:  
The notebook will be checked \_\_\_\_\_ (e.g., weekly/monthly).
11. If the trainee gets stuck while working on the project (e.g., has questions or needs help with a technique or data analysis), the procedure to follow will be:

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12. The standard operating procedures for working in our research group, which all group members must follow and the trainee agrees to follow, include: (e.g., require institutional training to wash your own glassware, attend weekly lab meetings, reorder supplies when you use the last of something, etc.)
13. The mentor and trainee have agreed on a mentoring approach, which consists of:
14. The mentor and trainee have discussed the methodology used in the lab in detail and the trainee understands what is expected of them. To become part of the lab, the trainee must complete the following safety procedures and/or ethics training(s): \_\_\_\_\_
15. The mentor agrees to read and revise the trainees research writing according to the following procedure:
16. The trainee agrees to not present any of the research findings from this laboratory in any shape or form without the explicit consent and approval of the mentor.
17. Other issues not addressed above that are important to our work together:

By signing below, we agree to these goals, expectations, and working parameters for this research project.

Trainee's signature \_\_\_\_\_ Date: \_\_\_\_\_

Mentor's signature \_\_\_\_\_ Date: \_\_\_\_\_

Professor's signature \_\_\_\_\_ Date: \_\_\_\_\_

# ADDITIONAL MENTORING RESOURCES

## Articles

- [Dear Mentors Series \(National Center for Faculty Development and Diversity\)](#)
- [One Mentor Isn't Enough. Here's How I Built A Network of Mentors by Erika Moore \(Science\)](#)

## Books

- [Entering Research: A Facilitator's Manual](#) by Janet Branchaw, Christine Pfund, and Raelyn Rediske
- [Faculty Mentoring: A Practical Manual for Mentors, Mentees, Administrators, and Faculty Developers](#) by Susan L. Phillips and Susan T. Dennison
- [Mentoring Faculty of Color: Essays on Professional Development and Advancement in Colleges and Universities](#) edited by Dwayne Mack, Elwood D. Watson, and Michelle Madsen Camacho

## Organizations

- [Center for the Improvement of Mentored Experiences in Research](#)
- [Graduate Career Consortium](#)
- [National Center for Faculty Development and Diversity](#)
- [National Research Mentor Network](#)