

PROGRAM COORDINATOR HANDBOOK



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**MENTORING
RESOURCE CENTER**

WAKE FOREST UNIVERSITY

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Program Coordinator Checklist

- Develop Goals
- Contact Mentoring Resource Center to Inform Staff of Your Plans
- Develop Program Design
 - Timeline
 - Responsibility
 - Continuity Plan
 - Communication Plan
 - Program Requirements
 - Budget
 - Logistics
 - Contingency Plan
- Recruit Mentees
 - Determine Number of Mentees
 - Develop Mentee Profile or Application
 - Communicate with Mentees
- Recruit Mentors
 - Determine Number of Mentors Needed
 - Develop Mentor Profile or Application
 - Communicate with Mentors
- Match Mentor Pairs
- Provide Training
 - For Mentors
 - For Mentees
- Provide Program Information to Mentoring Resource Center
- Schedule Regular Check-in Points
- Schedule Mid-Point Evaluation
- Schedule Final Evaluation
- Provide Closure Celebration
- Conduct Evaluation and Preparation for Next Year

Introduction

Thank you for choosing to coordinate a mentoring program at Wake Forest University! Mentoring has always been a part of the Wake Forest experience; at its heart is the teacher-scholar ideal. Faculty, staff, alumni, and even students provide great informal mentoring to Wake Forest students at all points of the college experience. Formal mentoring programs build upon these informal relationships and provide additional structure and oversight to ensure that effective mentoring is occurring for a targeted population.

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 continues to be core to the Wake Forest experience as the institution grows and develops. As part of the strategic plan, the University established four 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 plays a key role in each of these priorities. 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. Mentors learn how to nurture and support the growth of their mentees and mentees learn how to take responsibility for their own choices, decisions, and lives. Both learn how to build and to participate in effective relationships.

As part of the University's commitment to developing a 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 Wake Forest community and provides guidance, resources, support, and recognition for Wake Forest mentoring relationships and programs. Please do not hesitate to contact us:

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

Director, Allison E. McWilliams ('95), Ph.D.

336.758.3741 (voice)
mcwillae@wfu.edu

And, be sure to follow us on our blog (www.mentoringresourcecenter.tumblr.com) and on twitter (@WFUmentoring) for best practice information, resources, tips, and tools that you can use!

This handbook briefly touches on the basics of what you need to do to develop and implement your mentoring program. It should be emphasized that while mentoring can appear easy, it requires a complex and defined set of skills. And, like any strategic initiative, developing a mentoring program requires careful planning, deliberate implementation, and ongoing evaluation. Please take some time to talk with the Mentoring Resource Center staff throughout the development of your program as well as throughout its implementation and evaluation to ensure that it is the success that it should and can be!

What is Mentoring?

Mentoring actually 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, the word *mentor* has become synonymous with the terms trusted advisor, friend, teacher, and wise person.¹

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?

¹ Adapted from Shea, G. F. (2002). *Mentoring: How to develop successful mentor behaviors*. Menlo Park, CA: Crisp Learning.

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 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 mentors 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.

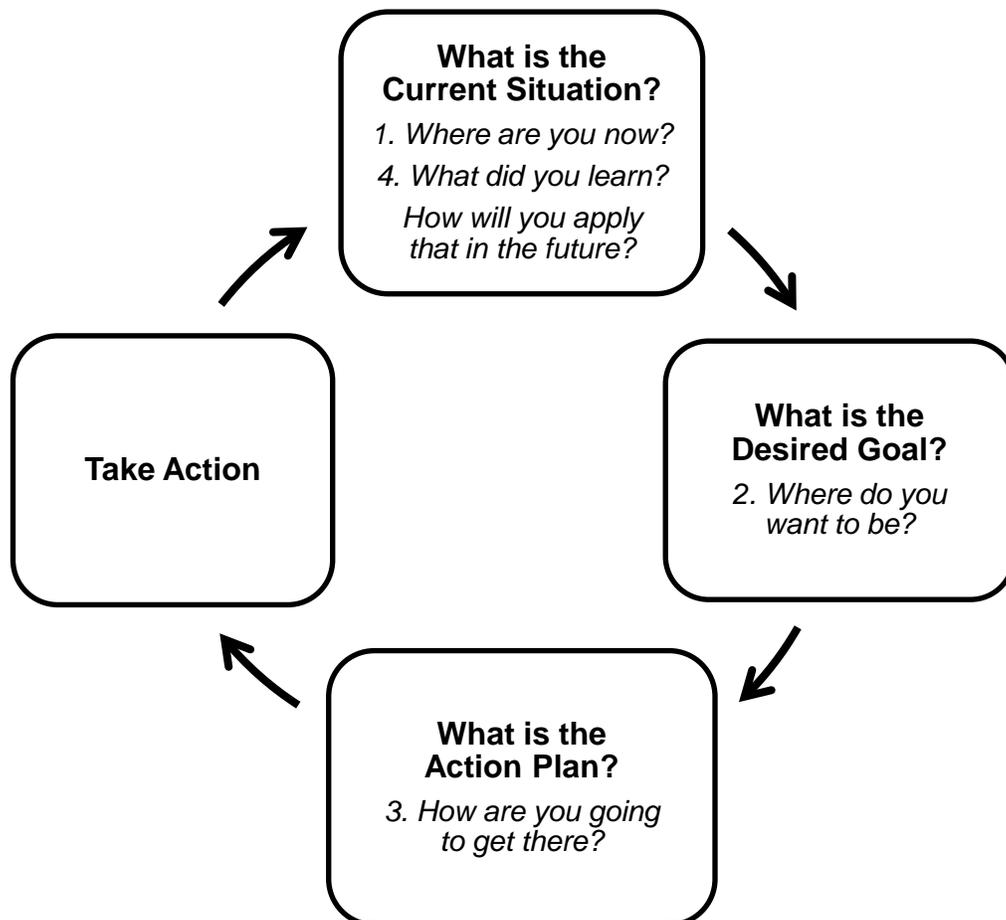
Formal mentoring most often happens through structured mentoring programs. The program dictates the beginning and ending dates to the relationship, provides expectations for how often mentees are to meet with mentors, requires regular check-in points with a Program Coordinator, and offers a formal orientation 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, 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.

The Mentoring Relationship

A mentoring relationship is built around intentional conversations. An effective mentoring conversation² 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



² http://mentoring-works.com/mentoring_conversation.html

Although they do not have to use the exact words, mentors use this model as a guide at each meeting with their mentees to talk about what is going on with the mentee, what the mentee would like to accomplish both long-term and before the next meeting with the mentor, and what steps the mentee plans to take to accomplish those short and long-term goals. At each subsequent meeting, the mentor should start the conversation by asking about progress on achieving those goals; thus the loop begins again.

Another way to think about this is the **ABC Model of Mentoring**³:

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 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 him that you will be checking in to see if he is doing what he said he would do. Keep him accountable and also build trust in the relationship by keeping your commitments.
 - When will we check in with each other on your progress?

³ Sanft, M., Jensen, M., & McMurray, E. (2008). *Peer mentor companion*. Belmont, CA: Wadsworth, Cengage Learning.

At the end of each meeting, the mentor and mentee should take a few minutes to debrief the conversation. The purpose of this debrief is to review what was discussed, seek clarity on goals and action steps for the next meeting, and evaluate the meeting's effectiveness. This debrief ensures that both the mentor and the mentee are in agreement about the plan of action, and it also serves as feedback to both on the effectiveness of the relationship.

The mentor's role is not to solve the mentee's problems for him. The mentor should help the mentee learn how to solve his own problems. As mentors develop relationships with mentees, it is important to keep in mind the unique challenges that college students face as they transition from high school to college. **Principles of student development** frame the important cognitive and emotional processes that every student must experience on their paths to adulthood.

The transition from high school to college to after-college is a transition from adolescence to adulthood. This is a key 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 Arnett⁴, 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.

A key part of the college student development process is learning how to confront and to deal with challenges both big and small; indeed, by learning how to solve small problems students acquire the key skills and knowledge needed to solve the larger ones, which 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 student. Additionally, several key factors impact the extent of student development in college: quantity and quality of involvement and engagement in campus life; individual values, beliefs, experiences, and perceptions that students bring with them to college; engagement with the physical environment and key individuals on campus; a sense of compatibility with the institution; and perhaps most importantly, the influence of one's peers, who establish norms for behavior and provide validation through inclusion, recognition, and acceptance.

⁴ Arnett, Jeffrey J. (2004). *Emerging adulthood: The winding road from the late teens through the twenties*. Oxford University Press.

Students in transition from high school to college confront unique issues and challenges including new academic experiences, a diversity of academic and social choices, increased cultural diversity, roommate and other social group issues, time management and setting priorities, and exploration of identity and beliefs. To help students address these issues and also learn the crucial skills of problem-solving and decision-making, mentors use particular skills in a mentoring conversation, which include:

- 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

Additionally, mentees use and develop particular skills over the course of a mentoring relationship, which include:

- Setting goals and creating an action plan for accomplishing them
- Active listening
- Effectively receiving and responding to feedback
- Taking initiative and ownership of developmental progress
- Building effective relationships
- Reflecting on key learning moments

An effective training and orientation program helps to develop and further explain each of these skills; more information can be found in the Mentor and Mentee Handbooks. Additionally, both mentors and mentees 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. As well, mentoring is not teaching, advising, counseling, or coaching, although mentors may adopt each of these roles over the course of the relationship depending on the needs of the mentee. Mentoring is goal-oriented and time-limited. Mentoring partners must know upfront what they are committing to and be willing to make that commitment. You should get confirmation from both mentors and mentees that they understand these commitments.

Expectations of Wake Forest mentors 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 Wake Forest mentees 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

Three Phases

Mentoring relationships, when they are managed effectively, have three distinct phases that each require different skill sets and different work by you, the Program Coordinator:

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.

As Program Coordinator, you will match mentors and mentees, provide training and orientation to the mentoring pairs, and pay careful attention to ensure that mentoring pairs are meeting and successfully beginning their relationships.

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.

In this phase you should perform regular check-ins with mentor pairs – at least quarterly if the program is for a year or more, and more frequently if the program is for less than a year – and provide ongoing support.

3. **The End** – in this phase the relationship must be redefined. The relationship and achievements are evaluated and accomplishments are celebrated.

It is particularly important not to downplay or ignore the importance of the third phase of the mentoring relationship. The act of separating can be particularly hard for mentor pairs, yet necessary. This is also an important developmental phase for the mentee and an opportunity for both mentor and mentee to reflect on what was learned and on how to carry that new knowledge forward. As Program Coordinator you should plan a closing to the formal program, collect a program evaluation from all participants, and then begin planning for next year's program.

Role of the Program Coordinator

Planning a mentoring program is equally as important as the program itself. Taking the necessary steps and investing the time now, before implementation, will ensure a successful program in the future. **Do not rush the process.** It is far better to take more time now, and to delay implementation, than to rush through the planning. **Start small and develop early successes.**

On the pages that follow, you will find guidelines and tools for those things you should be thinking about now. Briefly, there are ten areas of concern:

1. **Setting Goals** – Have clearly-defined goals for your mentoring program: what, specifically are you trying to achieve? How will your participants benefit as a result of participating in this program? What strategic needs does it meet?
2. **Program Design** – There are many factors to consider in the design of your program, including the budget, the timeline, responsible parties, logistics, communication, requirements, contingency plans, and continuity plans.
3. **Recruiting Mentors** – Think about how many mentors you will need, where you will find them, and how you will recruit them to your program.
4. **Matching** – There are numerous ways to match mentor pairs: through an application process, through ranking by participants, through “speed matching,” or through demographic variables.
5. **Training** – Provide, at a minimum, orientation training for both mentors and mentees to introduce them to the concept and expectations of mentoring.
6. **Feedback** – Build in regular feedback loops into any mentoring program: how and when will you check in with your mentor pairs to assess progress?
7. **Tracking** – Create a system for maintaining records of who is participating in your mentor program. This allows us to keep accurate records of who is participating in mentoring within the Wake Forest community and to evaluate the reach and effectiveness of our mentoring efforts.
8. **Evaluation** – Evaluate your mentoring program on a regular basis, to assess what is working well and what could be improved for the future.

9. **Celebration and Closure** – Do not ignore the importance of recognizing the end of your mentoring program. Develop an event to celebrate accomplishments, thank your mentors, and formally close the program.

10. **Ongoing Support** – As Program Coordinator, look for opportunities to provide ongoing support to mentors and mentees. Additionally, the Mentoring Resource Center provides tools, strategies, and support both to you and to your mentoring program participants.

On the following pages, we examine each one of these important items in detail, as well as provide tips and tools to support the development of your mentoring program. Let's get started!

Goals

Any well-planned and well-executed program begins by developing goals. Begin with the end in mind. What is the purpose? What are you trying to achieve? How will you know when you have achieved it? Goals provide direction, accountability, and a means for measuring progress. Additionally, goals will help you focus your thinking: what is it, specifically, that you are trying to achieve? And, is mentoring the right strategy to achieve it?

Well-written goal statements follow the SMART goal model:

Specific – the goal statement should be concrete and action-oriented. What, specifically, are you trying to accomplish? Ask yourself: 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)? *Have* and *be* are not action verbs.

Measurable – how will you know when you have achieved the goal? How will you track and measure progress? How will you measure your program's success?

Achievable – the goal should require work, but be attainable. Is the goal too big (setting up your program for failure) or too limited (not requiring your participants to stretch)?

Realistic – is this something that can and will be done? What additional resources of time, money, or capability will be needed to reach the goal?

Timely – there should be a specific, realistic time-frame for achieving the goal.

An example of a SMART goal statement:

Develop 20 new job opportunities for French Club members by the end of the summer.

After you have written your goal statements, you should consider whether mentoring is the best method for achieving them. For example, the goal statement provided above *is not* a goal that would be best served by a mentoring program.

A goal statement that might be well-served by a mentoring program:

Increase understanding of the world of work for 20 French Club members by the end of the summer.

Why is it important to determine whether your goals are good mentoring goals? Once you have developed your goal statements, each subsequent decision in your program design and implementation will be driven by those goals. If mentoring is not the appropriate strategy, you will end up wasting a lot of time and energy.

Your goal statements should be focused on your participants: what can a participant in this mentoring program expect? You should be able to show your goal statements to your mentors and, as a result, they should understand exactly what you want them to do as mentors. On the other side, your mentees should be able to look at your program's goal statements and understand exactly what they should expect to get out of a mentoring relationship by participating in this mentoring program. How will your participants benefit as a result of participating in this program? What strategic need does it meet?

Using the French Club as an example, twenty members know that as a result of participating in this program their understanding of the world of work is expected to increase. And, potential mentors know that their conversations and activities throughout the program will focus on the world of work and not on other topics.

It is important to note that you could have more than one goal for your mentoring program.

Now it's your turn. Take a moment and think about the goal or goals that you would like to achieve. Remember to make the goal statements specific, measureable, achievable, realistic, and timely. Use the space below to write out your goals.

Goal:

Goal:

Goal:

When you are finished, assess each goal statement to answer the following question:

Is mentoring the *best* strategy to achieve this goal?

Program Design

Once you have established the goals for your mentoring program, it is critically important that you take the time to design the program. The first step is to think about all of the activities that need to take place between now and the conclusion of the program.

Recommended Program Design Activities:

- If appropriate, form a planning committee, including some younger or junior members for future continuity of the program (this is particularly applicable to student-led programs)
- Develop a budget for the program
- Determine how many mentors you will need and how you will recruit them
- Develop application process for mentors and mentees
- Develop contingency plan for mentor pairs who don't work out
- Develop a communications plan for advertising and communicating information to mentors and mentees
- Decide start and end dates to program
- Determine date and location for training programs and who will facilitate these
- Determine matching process for mentor pairs
- Decide and communicate program expectations
- Determine check-in points with mentor pairs to assess progress
- Design program evaluation
- Determine date and location for closing celebration and agenda
- Set date and time for committee debrief and to start next year's planning

It is helpful to chart these things out, so that you can see on paper what might be missing and also to keep track of accountability and logistics. On the following pages you will find a sample chart plus a blank copy for you to fill in with all of the activities that have to happen from now through the end of your program. Take a few moments to fill it out and use more paper if needed. No item is too small or unimportant. Don't worry so much about the order that the items should come in, we will talk about that after you fill in the chart. For now, just get the items written down.

Wake Forest University Mentoring Program Planning Chart

What? (Activity, Event, Action)	By When?	Who is Responsible?	Logistics	Budget
Form planning committee, hold first meeting <ul style="list-style-type: none"> • Set goals • Develop timeline • Set budget 	9/1/2012	Kate	Reserve room in Benson	\$0
Develop communications plan, including website	11/1/2012	Joe	Page on Club website	\$500
Mentor recruitment	2/1/2013	Sarah	TBD	\$250
Mentee recruitment at monthly Club meetings	11/1/2012, 1/1/ 2013	Kate	Planned meetings	\$0
Matching of mentor pairs	3/1/2013	Sarah	Committee meeting	\$0
Plan training session	3/1/2013	Sarah	Need location, facilitator, materials, possibly food	\$500
Program starts	3/1/2013	All of us	TBD	\$0
Send notification of training, matches, to pairs	3/1/2013	Kate	Paper and postage	\$50
Check-in by phone with mentor pairs	5/1/2013, 7/1/2013	Kate	N/A	\$0 (will absorb costs on cell phone bill)
Do final evaluation	8/15/2013	Joe	Online evaluation	\$0 (will absorb in web costs)
Closure celebration, program ends	8/15/2013	Sarah	Need location, facilitator, materials, food	\$500
Committee debrief, 2014 program planning	9/1/2013	Sarah (next year's chair)	Reserve room in Benson	\$0
Total Budget				\$1800

Once you have charted all of the activities and actions that you can think of, rewrite them into a chronological timeline for everything that has to happen between now and the end of the mentoring program. You may find that this timeline includes some items that you left off of your original chart; be sure to go back and add those in and account for who is responsible, budget, and logistics.

For example, again using the French Club Mentoring Program:

September	Form committee – ensure some sophomores and juniors are included for continuity. Sarah will be next year’s chair. Actions for first committee meeting: <ul style="list-style-type: none"> ▪ Set goals ▪ Develop program timeline including accountability ▪ Set budget ▪ Set future committee meeting schedule
October	Develop mentor selection criteria Develop mentor and mentee interest forms – build web portal
November	Announce mentoring program at monthly Club meeting
January	Remind members at monthly Club meeting, distribute interest forms Post mentor interest forms to web Arrange location and time for training session. Check budget to see if we can afford food.
February	Match mentors and mentees Send out info on training session
March	Hold mentor and mentee training sessions to kick off program
May	Check-in with mentor pairs (by phone) to see how the relationship is going
July	Arrange location and time for closure celebration. Send letter to mentor pairs informing them of the time and place. Check-in with mentor pairs (by phone) to see how the relationship is going
August	Hold closure celebration Do final evaluation
September	Committee debrief of program accomplishments. Begin planning for next year.

Recruiting Mentors

Critical to your mentoring program's success are the mentors. In this planning stage it is important that you think about how many mentors you will need and where you will find them.

The number of mentors that you need will depend on your program's goals and your program's design. For example, the French Club Mentoring Program is designed for 20 mentees. The program planners will need to locate at least 20 mentors, and more if they want to provide a "pool" of mentors for mentees to choose from, as opposed to selectively matching mentors as they recruit them (in which case they need to find the 20 best mentors that they can). So, **first you must decide how many mentors you will need.**

Next, decide who these mentors should be. The French Club Mentoring Program has been designed to match mentees with alumni. Depending on the goals of your program, you may need upperclassmen students, faculty, or staff as mentors. Again, it all depends on the goal of your particular program – this is why setting goals is so important! So, **second, determine who your mentors will be.**

Some potential qualifications for mentors that you may wish to consider:

- Sincere desire to support the personal and professional goals of another person
- Excellent communication and interpersonal skills
- Openness to learning
- Sensitivity to people of different backgrounds
- Accessibility
- Positive attitude
- Dependability
- Self-esteem
- Initiative
- Integrity

Once you have decided how many mentors you need, and determined who those mentors will be, you need to come up with a plan for recruiting those mentors. For this step think about the goals for your program and potential avenues for recruitment. For instance, the French Club Mentoring Program has as its goal to *increase understanding of the world of work for 20 French Club members by the end of the summer*. The organizers of that

program need to find at least 20 experienced professionals to serve as mentors. The French Club happens to keep excellent records of alumni contacts (former French Club members). Another resource they could use is the alumni office at Wake Forest. So, **third, develop a plan for recruiting mentors.**

Not only do you need to think about *where* you will find your mentors, but you also need to think about *how* you will reach them. There are several possibilities.

1. Send a letter to potential mentors asking if they would be willing to volunteer their time to the mentoring program. Explain the goals and the time commitment and provide information on how these potential mentors can get involved. Include a brief interest form they can fill out and return to you (postage paid) or access to a web address where they can fill out an interest form on-line. This is a good route to take if you would like to develop a pool of potential mentors.
2. Contact mentors directly by phone or in person and request their participation. It is helpful to write out a script for these conversations, so that you are sure to cover all of the important points (goals, expectations, time commitment). Ask for a commitment over the phone, direct them to a web-based interest form, or tell the potential mentors that you will follow up with written information on how they can express their interest. This is a good route to take if you are identifying specific mentors for your mentees (not building a pool).
3. Develop a web-based interest form for potential mentors and send it out to individuals by email. Be sure to include the goals, expectations, and commitments in your email as well. Again, this can be a good avenue for developing a pool of potential mentors.

A Note: If you are developing a pool of potential mentors, you should be upfront about this. Explain that mentor matches will be made based on the specific needs of the mentees, to ensure the most successful experience for the mentor pairs; therefore, not every mentor may be successfully matched with a mentee at this time. Also explain that, with the mentor's permission, mentor information will be kept in the mentoring program's database for future mentees.

On the following pages you will find a sample letter to potential mentors, a sample script for a phone call or in-person discussion with potential mentors, and a sample interest form for potential mentors to express their interest in participating in your program.

**Wake Forest University
Mentor Recruiting Letter**

January 1, 2013

Dear Mr. Smith,

My name is Sarah Jones and I am a junior at Wake Forest University and the secretary of the French Club. As you are an alumnus of both Wake Forest and the French Club, I wanted to write to you to tell you about an exciting new program that we are starting this semester. Here at Wake Forest, as you will recall, we have a strong tradition of student mentoring: connecting faculty, staff, and alumni with students to help them grow both personally and professionally. We have decided to develop a formal French Club Mentoring Program, which we believe will provide great opportunities for our members to learn from professional alumni such as yourself; as well, we hope it will provide opportunities for our alumni to connect with the campus and with our students in a meaningful way.

The goal of our mentoring program is to *increase understanding of the world of work for 20 French Club members by the end of the summer*. The mentoring program will begin on March 3 with an official kick-off training program and conclude on August 15 with a closing celebration. We request that mentor pairs commit to at least two in-person meetings per month.

I hope that you will consider participating in the program! I am attaching a brief Mentor Interest Form, which you can send back to me; also, you can find this form online (www.wfu.edu/frenchclub/mentor). We request that you indicate your interest by February 1. And, if you have any additional questions, please do not hesitate to contact me.

Sincerely,

Sarah Jones
336-758-0000
sarah@wfu.edu

Wake Forest University Mentor Recruiting Phone/In-Person Script

Good morning, this is Sarah Jones, a junior at Wake Forest University. May I please speak with Mr. Smith?

Mr. Smith, how are you today?

I'm calling on behalf of the French Club. As you may recall, Wake Forest has a strong tradition of student mentoring by faculty, staff and alumni, to help students grow both personally and professionally. We have decided to develop a formal French Club Mentoring Program, which we believe will provide great opportunities for our members to learn from professional alumni such as yourself; as well, we hope it will provide opportunities for our alumni to connect with the campus and with our students in a meaningful way.

I'm calling to see if you would be interested in potentially serving as a mentor to one of our students. Let me tell you about the goals and expectations. Our goal is to *increase understanding of the world of work for 20 French Club members by the end of the summer*. The program begins on March 3 with an official kick-off and training, and will conclude August 15. We would ask that you meet with your mentee at least twice a month between those dates. Does that sound like something you would be interested in?

Great! We have a brief Mentor Interest Form that we would like for you to fill out. This will let us keep track of your interest and also will help us match mentors and mentees. Now, let me be upfront and tell you that, depending on the needs of our students, there is a chance you will not be matched this year. But if it's ok with you, if you aren't matched with a student this year we will hold onto your information for future students as well.

Great. So I can email you this form, or give you the website where you can find it, or I can send you a copy in the mail. I can also fill it out for you right now while we are talking. Which would you prefer?

Thank you so much Mr. Smith. I will be in contact with you soon to let you know about the matching process.

**Wake Forest University
Mentor Interest Form**

Name: _____

Professional Title: _____

Mailing Address: _____

Email: _____

Phone: _____

Please provide a brief description of your work duties/roles:

Please provide a list of your professional interests:

Please provide a list of your personal interests:

What do you hope to gain from a mentoring relationship?

Matching

Once you have determined how you will recruit your mentors, think about how you will match those mentors with your mentees. There are several options for doing this:

- You can ask both mentors and mentees to fill out a brief application, describing their interests, and then you as the Program Coordinator can make the matches as you deem appropriate.
- You can present a brief biography on each of the mentors to the mentees and have them rank order their top picks.
- You can get both groups in a room and do a version of “speed matching.”
- You can match based on key demographic variables – female with female, male with male, for instance.

The bottom line is this: the key component to a successful match is the desire and willingness of both individuals to participate, to communicate, and to learn. And, as with all components of your program, the Mentoring Resource Center can help you as you complete your matching process.

Of the options listed above, we recommend that you ask your mentees to fill out a brief interest form, much like your mentors did, and that you as the Program Coordinator then oversee the matching process. This allows you to control the process and it removes the guesswork for the mentors and the mentees. Much like with your mentors, you can develop either a paper or a web-based form. Be sure to include information on the program’s goals, expectations, and commitments. Then, based on the information provided, match mentors with mentees. Think about who has similar interests, goals, or other criteria (gender, race, location, professional expertise) that would provide a solid foundation for matching.

A sample mentee interest form is included on the following page.

**Wake Forest University
Mentee Interest Form**

Name: _____

Year in School: _____

Mailing Address: _____

Email: _____

Phone: _____

List 3-4 personal interests

List 2-3 goals for your mentoring relationship (what do you want to work on or discuss?)

What do you hope to gain from a mentoring relationship?

What qualities are you looking for in a mentor?

Training

No matter the form of recruitment or matching process that you select, you must provide training and orientation to your mentors and your mentees so that they are clear on what is expected of them, what they are committing to, and what they should do during the mentoring relationship.

Orientation should begin through your initial communication with your mentors and mentees, whether it is through electronic communication, a phone call, or in person. Tell them the goals for the mentoring program, your expectations for how often the mentoring partners will meet and what they will discuss during those meetings, and the beginning and end dates to the mentoring program. If you have other requirements or expectations, for example, a mid-point group meeting, you should communicate this upfront as well. Do not assume that your participants know anything about the program, or that they know anything about mentoring. The more information that you can provide, the better off your participants, and as a result, your mentoring program, will be.

At the beginning of the program, conduct training sessions for your mentors and mentees. You can either hold separate sessions for both groups, which will allow them to ask questions specific to their role in the process and to network a bit with their fellow mentors or mentees, or you can provide a joint training session which will allow mentoring pairs to meet for the first time in a structured environment.

Things to consider:

- Will your mentees feel uncomfortable asking questions or speaking up in front of the mentors? This may be the case if your mentors are faculty, staff, or alumni. If so, it would be wise to hold separate training sessions for your mentors and mentees.
- Will your mentoring pairs have a hard time getting these relationships started? If so, it would be wise to provide a group training session in order to facilitate those sometimes difficult beginning conversations.
- Is your program quite large? If so, it will be necessary to hold separate training sessions or to break the mentoring partners into smaller groups in order to have productive conversations during the training. For example, the French Club Mentoring Program is aiming for 20 mentoring pairs. Forty people in a training session, while not impossible, is not necessarily ideal. Two groups of 20 would be far better.

The Mentoring Resource Center can facilitate training for your mentoring program, schedule permitting. Additionally, the Mentoring Resource Center can provide copies of the Mentor Handbook and the Mentee Handbook, which are great resources to support the training and the participants. If you choose to facilitate your own training, you will find below a sample orientation training agenda. On the following pages are some tips for effectively facilitating a mentoring program training session.

Sample Orientation Training Agenda (can be adjusted from 1 hour – ½ day session)

Introductions and Welcome

- Review Agenda and Learning Outcomes
- Review Training Materials

What Do We Think About When We Think About Mentoring?

- Individual Activity – What does “mentoring” mean? – Reflect and discuss with large group
- Review and Discuss Definitions of Mentoring
- Small Group Activity – What have we learned from our mentors? – Individual reflection on lessons learned from previous mentoring experiences and small group discussion about the implications for *this* mentoring relationship.

Effective Mentoring Conversations

- Review the Three Phases of Mentoring Relationships
- Review the Mentoring Conversation Model
- Discuss Skills of Effective Mentors/Mentees
- Small Group Activity: Practicing Mentoring Conversations – In pairs, practice mentoring conversation model using real-life situations.

Expectations

- Review the Expectations for Mentors/Mentees
- Discuss Goal Setting Skills and Tools
- Individual or Small Group Practice – Goal setting – Individually or in small groups work on writing goal statements for the mentoring relationship

Final Thoughts and Wrap-up

- Training Evaluation

Tips for Facilitators

Facilitating a training session takes a combination of skill, art, and practice. If your budget allows for it, hiring a trained and skilled facilitator for your training session is ideal. If not, here are some useful tips for facilitating your training:

Prepare – Be sure to prepare a detailed agenda. Develop learning outcomes for the training – what should your participants expect to take away from the session? Your agenda should reflect those key learning outcomes. Then, develop your training materials and training plan off of your agenda. Also, practice, practice, practice. Know your materials frontwards and backwards. Practice with a stopwatch – will you have enough time to cover everything? Do you have enough material for the time allotted?

Provide a Range of Learning Activities – People learn in different ways. Some people do best in a lecture format. Others need to actively participate, to actually *do something* rather than just be told how to do it. In order to reach all of your participants, as well as to break up the session, include a range of activities – some lecture, some reflection (individual journaling or answering questions), some small group work and large group discussion, some role play or other type of simulation. When you can combine two or more of these activities on one topic, it reinforces the learning. So, for example, present material on effective goal setting, then have a group discussion on best practices for goal setting, then do individual practice writing goal statements. The lesson (effective goal setting) is reinforced, and all of the diverse learning styles' needs are met.

Know Your Audience – Tailor your training plan to the people in the room. Think about what they already know on the topic and what they need to learn. Think about which sorts of activities work better with which audiences. Take the time to find out who will be in the room, their backgrounds and experiences.

Be Flexible – Be prepared for all of your best rehearsed plans to go awry at the last possible minute! If you have planned a solid hour's worth of material, also be prepared if your time gets cut in half. Be prepared for participants who like to talk and discuss (and therefore take up some of your time) and for participants who refuse to talk (therefore possibly leaving you with "dead" time). Be prepared for participants who know nothing about mentoring and for participants who know everything about mentoring. The bottom line: be prepared!

Follow the Discussion – Remember that your job is to *facilitate*. Often the best information, and the best learning, comes from the participants themselves, not from you. If your participants get into a great discussion, follow that and see where it goes. Be the

effective facilitator by asking thoughtful, open-ended questions, digging deeper for information, and finding ways to connect the conversation back to the material at hand. BUT! Also be mindful of your agenda and your time! Manage the conversation so that it does not take over the time allotted and prevent the participants from gaining the information that they need.

Don't Forget About Closure – The old adage about effective presentations is: tell them what you're going to tell them, tell them, then tell them what you told them. The same could hold true for effective training. Start the session with an overview of the agenda and the learning outcomes: roadmap the training session for the participants. And then, at the end, be sure to wrap it all up with a quick summary of the key learning points and final thoughts. Reinforce the learning outcomes. Tell them what you told them!

Finally, while the orientation session is extremely important, do not forget about other opportunities to provide training for your participants. For example, a mid-program check-in is very helpful, both to see how the participants are doing, but also to provide training on a topic of interest and value to the participants, including best-practice sharing and trouble-shooting. Additionally, do not miss the opportunity to use the closure of your program as a training event as well.

Feedback

Develop regular points to check in with both the mentors and the mentees, individually, to see how the relationship is progressing. Do not assume that “no news is good news”; too much time may pass before you discover that a mentor pair has not been meeting or that the relationship is not working out when you could have fixed the situation.

Sometimes (though not often), this does occur, and you will need to make a change. This is OK! Both the mentor and the mentee will appreciate that you stepped in and allowed them to have a more productive relationship with someone else. Thinking through these possible situations in advance, and how you will handle them, will make them easier to deal with if and when they do occur. As well, the Mentoring Resource Center can assist you if such a situation does arise.

If your program is a year or longer, you should check-in with the mentoring pairs at least quarterly; shorter programs will require more frequent contact. This can be accomplished through a short in-person meeting, a phone call, or, if necessary, email contact (this last option is the least desirable and should only be used as last resort).

Questions to ask:

- Are you meeting with your mentoring partner?
- What is working well in the relationship?
- What is not working well in the relationship?
- How can I help?

Additionally, a group meeting (both mentors and mentees) at the mid-point of your program is a great opportunity to check-in with the mentoring pairs in person. This is an opportunity to facilitate a large group conversation on the questions above, as well as to do some best practice sharing of information between and among the mentoring program participants.

Tracking

The Mentoring Resource Center staff asks that you keep detailed records of your mentor pairs. Not only does this allow us to build a potential mentor “pool” for the future, it also allows us to keep accurate records of who is participating in mentoring within the Wake Forest community and to evaluate the reach of our mentoring efforts.

Develop a spreadsheet for your mentoring program to track this information. This will help with continuity – future program coordinators will know who has participated in the past. Also it will provide a pool of mentors for you to access in the future, so that you do not have to recreate this information each time you begin planning your mentoring program. Remember that a well-planned and well-organized program will be a well-executed program.

Additionally, the Mentoring Resource Center has created an online list of formal mentoring programs that serve Wake Forest students. Any program that adheres to the following standards will be included in this list:

- Established learning outcomes
- A clearly-defined structure that includes established beginning and end points, a process for soliciting, matching, and training mentor pairs, clearly communicated expectations for meetings and check-in points, evaluation of program success
- Adherence to the Wake Forest definition of mentoring

Once you have created your mentoring program, provide a brief description, your contact information, and a web link and we will include it in the list.

Evaluation

At the conclusion of your program you should request a confidential evaluation from both the mentors and the mentees. The Mentoring Resource Center can help you develop this evaluation. Additionally, it is good practice to do a mid-point evaluation to make sure that everyone is on track. Again, don't fall for the "no news is good news" assumption.

Your specific program evaluation, like everything else, should be directly linked to the goals for your program. For example, the French Club Mentoring Program identified the following goal:

Increase understanding of the world of work for 20 French Club members by the end of the summer.

On the following page is a sample program evaluation form for French Club mentees. Use the evaluation results to assess your program's success and to evaluate needed changes for next year. (You should also evaluate your mentors.)

Additionally, there is a sample training evaluation provided. Ask your participants to complete this evaluation at the end of your training sessions to assess the effectiveness of your training skills, content, and delivery method.

Wake Forest University Mentoring Program Evaluation

French Club Mentor Program Mentee Evaluation

Please pick a rating (1-5) for each of the questions. Provide additional detail in the Comments section.

1. Overall, this mentoring program:

1	2	3	4	5
Did not meet expectations	Somewhat met expectations	Met expectations	Somewhat exceeded expectations	Exceeded expectations

2. As a result of this program, my personal/professional network has increased:

1	2	3	4	5
Not at all	Somewhat	A little	A good deal	A lot

3. As a result of this program, my understanding of the world of work increased:

1	2	3	4	5
Not at all	Somewhat	A little	A good deal	A lot

4. As a result of this program, my knowledge of effective mentoring practice increased:

1	2	3	4	5
Not at all	Somewhat	A little	A good deal	A lot

Comments:

Thank you for your feedback!

**Mentoring Resource Center
Training Evaluation**
Date: _____

Training Title: _____

Facilitator: _____

Please pick a rating (1-5) for each of the questions. Provide additional detail in the Comments section.

1. Overall, this training:

1	2	3	4	5
Did not meet expectations	Somewhat met expectations	Met expectations	Somewhat exceeded expectations	Exceeded expectations

Comments:
2. The facilitator for this training:

1	2	3	4	5
Did not meet expectations	Somewhat met expectations	Met expectations	Somewhat exceeded expectations	Exceeded expectations

Comments:
3. The teaching/facilitation method used in this training was:

1	2	3	4	5
Not at all helpful	Somewhat helpful	Helpful	Mostly helpful	Extremely helpful

Comments:

4. The learning objectives for this training were:

1	2	3	4	5
Not at all met	Somewhat met	Met	Mostly met	Completely met

Comments:

5. My knowledge of effective mentoring practice increased:

1	2	3	4	5
Not at all	A little	Some	A good deal	A lot

Comments:

5. Future training topics I would be interested in attending:

6. Other comments:

Thank you for your feedback!

Closure and Celebration

At the end of the program, it is important to bring official closure to the program and to celebrate its success. Thank your mentors for their time and investment. Bring an end to the official, formal relationship and celebrate all that they have accomplished!

At a minimum an official letter of thanks should go from you to each participant. A sample thank you letter is included below.

August 16, 2013

Dear Mr. Smith,

On behalf of the Wake Forest French Club, thank you so much for the time and energy that you committed to the French Club Mentoring Program this year. Because of mentors like you, our inaugural program was an enormous success. As you heard at yesterday's closing celebration, you and your fellow mentors have truly touched the lives of the mentees. It is a testament to you that we already have 30 students who have requested to participate in the program next year.

I will be contacting you in a few months to see if you will be willing to lend your time as a mentor once again. In the meantime, I hope that you have a wonderful fall, and again, thank you!

Sincerely,

Sarah Jones
336-758-0000
sarah@wfu.edu

If your budget allows for it, you should provide an official closure event, such as a lunch, reception, or other event. This sort of an activity gives a structured opportunity for the mentees to thank their mentors and for you to thank the mentors and the mentees on behalf of your group and the University. This sort of celebratory event also provides one more networking and developmental opportunity for the mentor pairs. A sample agenda for such an event is included below.

Sample Closure Event Agenda

5:00 pm	Reception begins in Reynolda Hall Nosh and Network	
5:30 pm	Welcome:	French Club Faculty Advisor Kate Evans, French Club President
5:45 pm	Keynote Speaker:	Winston-Salem Company President, “The Power of Mentoring Networks”
6:15 pm	Thank You’s and Testimonials:	Mentees to their Mentors
7:00 pm	Adjourn	

Ongoing Support

As the Program Coordinator, you are the main point of contact and source of support for your program participants. You should provide them with your contact information, in case they have concerns about the relationship, need ideas on conversation topics or activities, or need other assistance. Also, you should think of ways in which you can provide support during the program. Suggested activities include:

- Provide periodic informal training sessions
- Bring in speakers and provide other networking opportunities
- Send out regular emails that include tips, strategies, and resources

The possibilities are almost endless! Remember, the participants in your program, both mentors and mentees, are expecting to hear from you. Communicate with them regularly. It will go a long way to keeping everyone engaged and enthusiastic about the program.

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 University, 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 process alone! The Mentoring Resource Center is here to help, to assist with the matching process, to provide training, develop evaluations, and to offer support and guidance. Check out the tumblr site for additional tools and resources (www.mentoringresourcecenter.tumblr.com). Additionally, there are many books and online resources that you may find useful; a few are listed on the following page. Again, thank you for making this valuable and valued contribution to the Wake Forest community. You are truly making a difference!

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.

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

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

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

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

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

Zachary, Lois J., & Fischler, Lory A. (2009). *The mentee's guide: Making mentoring work for you*. San Francisco, CA: John Wiley & Sons, Inc.

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