

Specific Suggestions for Matching

- Base the matching process on the program's goals & objectives
- Base matching decision on multiple factors
- Ensure consistency in matching process
- Ensure some level of similarity, even for dissimilar pairings
- Pair mentors and program participants in close physical proximity

Action Plan for Matching

- Determine what specific characteristics will be used for the match and measure those characteristics
- If multiple characteristics are identified, determine a weighting system
- Determine who will be responsible for making the matches
- If mentor or protégé input will be used, determine how those individuals will garner information about potential partners (e.g., through written feedback, social functions, individual interviews)
- Decide how the match information will be communicated to protégés and mentors
- If more potential mentors were recruited than are actually needed, determine how to inform those not chosen

Sample Questions to Consider for Profile Matching

- Is the mentor senior enough in comparison to the protégé to be a valuable learning resource?
- Are mentor and program participant physically accessible to one another?
- Does the mentor have the skill set needed to meet the developmental needs of the protégé?
- Does the mentor have the right connections in order to help the protégé build a high quality professional network?
- Does the protégé possess the characteristics that the mentor described as valuable to him or her?
- Does the mentor possess the characteristics that the protégé described as valuable to him or her?
- Does the mentor have the right combination of knowledge and experiences in order to provide sound instruction, guidance, and wisdom to the protégé?
- Is there enough similarity in backgrounds (e.g., hobbies, interests, research area) to ensure some common ground in the relationship?

Guidelines for Mentoring Structure and Processes

- Decide on the level of confidentiality required of mentors and protégés; Communicate this to both parties and decide if it should be part of a written mentoring agreement
- Decide on whether a mentoring agreement or contract will be used and design a template to guide goal setting, boundary setting, and expectations
- Determine what the meeting frequency guidelines will be and whether meetings are mandated, recommended, or fully determined by each pair; Communicate this to both mentors and protégés
- Determine whether the length of the relationship will be set by the program or set by individual pairs; Communicate this to mentors and protégés
- Communicate role expectations for both mentors and protégés
- Decide on the types of planned activities (e.g., social events) will be included in the program (if any)

Guidelines for Monitoring and Evaluation

- Plan how often you will check in with mentors and protégés throughout the relationship
- Decide whether check-ins will involve surveys, individual meetings or group meetings (or a mix of methods)
- Create a list of questions to be used for the check-ins
- Determine a step-by-step plan for handling problems within matches; Pairs should be informed of this during orientation
- Decide how the data gathered will be tracked, analyzed and who will be responsible for these activities
- Determine what reactions you would like to gather from protégés and mentors
- If productivity (e.g., publications, presentations, grants submitted) is a measurable objective determined at the outset, create or select a measure to assess this outcome; Ideally this would be a pre- and post-measure to look for change
- If department-level outcome (e.g., retention, yearly reviews, promotion & tenure rate) is a measurable objective determined at the outset, create or select a measure to assess this outcome; Ideally this would be a pre- and post-measure to look for change
- Decide on the method for collecting these evaluations (e.g., surveys, focus groups, individual meetings)
- Create a timeline for when various measures will be taken and determine who will be responsible for carrying out the process