

Elements of Effective Mentoring Practices

1. A **statement of purpose and long-range plan** that includes:
 - Who, what, where, when, why and how activities will be performed.
 - Input from originators, staff, funders, potential volunteers, and participants.
 - Assessment of community need.
 - For mentoring involving older adults, awareness of ageist attitudes found in young people, potential volunteers, family members, and staff.
 - Realistic, attainable, and easy-to-understand operational plan.
 - Goals, objectives, and timelines, for all aspects of the plan.
 - Funding (including a small monthly stipend to cover expenses mentors might incur) and resource development plan.
2. A **recruitment plan** for both mentors and participants that includes:
 - Strategies that portray accurate, realistic expectations and benefits.
 - For mentoring involving older adults, strategies to address special issues (e.g. providing transportation for older adults who may not drive or be able to afford or use public transportation, offering lunch, getting insurance coverage, etc.).
 - Targeted outreach based on participants' needs.
 - Year-round marketing and public relations.
 - Volunteer opportunities beyond mentoring.
 - A basis in your program's statement of purpose and long-range plan.
3. An **orientation for mentors and participants** that includes:
 - Program overview.
 - Description of eligibility, screening process, and suitability requirements.
 - Level of commitment expected (time, energy, flexibility).
 - Expectations and restrictions (accountability).
 - Benefits and rewards they can expect. Be realistic and clear.
 - A separate focus for potential mentors and participants.
 - A summary of program policies, including written reports, interviews, evaluation, and reimbursement.
4. **Eligibility screening** for mentors and participants that includes:
 - An application process and review.
 - A face-to-face interview and home visit.
 - Reference checks for mentors, which may include character references, child abuse registry check, driving record checks, and criminal record checks where legally permissible.
 - Suitability criteria that relate to the program statement of purpose and needs of the target population. Could include some or all of the following: personality profile; skills identification; gender; age; language and racial requirements; level of education; career interests; motivation for volunteering; and academic standing.
 - Successful completion of pre-match training and orientation.
5. A readiness and training **curriculum** for all mentors and participants that includes:
 - Trained staff trainers.
 - Orientation to the program and resource network.
 - Skills development as appropriate.
 - Cultural/heritage sensitivity and appreciation training.
 - For mentoring involving older adults, ageism training for both mentors and participants to overcome ageist myths and stereotypes.
 - Communication skills development.
 - Guidelines for participants on how to get the most out of the mentoring relationship.

Elements of Effective Mentoring Practices (continued)

- Do's and Don'ts of relationship management.
- Job and role descriptions.
- Confidentiality and liability information.
- Crisis management/problem solving resources.
- Ongoing sessions as necessary.

6. A **matching strategy** that includes:

- A link with the program's statement of purpose.
- A commitment to consistency.
- A grounding in the program's eligibility criteria.
- A rationale for the selection of this particular matching strategy from the wide range of available models.
- Appropriate criteria for matches, including some or all of the following: gender; age; language requirements; availability; needs; interests; preferences of volunteer and participant; life experience; temperament.
- A signed statement of understanding that both parties agree to the conditions of the match and the mentoring relationship.
- Pre-match social activities between mentor and participant pools.
- Team-building activities to reduce the anxiety of the first meeting.

7. A **monitoring process** that includes:

- Consistent, scheduled meetings with staff, mentors, and participants.
- A tracking system for ongoing assessment.
- Written records.
- Input from community partners, family, and significant others.
- A process for managing grievances, praise, re-matching, interpersonal problem solving, and premature relationship closure.

8. A **support, recognition, and retention** component that includes:

- A formal kick-off event.
- Ongoing peer support groups for mentors, participants, and others.
- Ongoing training and development.
- Relevant issue discussion and information dissemination.
- Networking with appropriate organizations.
- Social gatherings of different groups as needed.
- Annual recognition and appreciation event for mentors.
- Newsletters or other mailings to participants, mentors, supporters, and funders.

9. **Closure steps** that include:

- Private and confidential exit interviews to de-brief the mentoring relationship between: participant and staff; mentor and staff; mentor and participant without staff.
- Clearly stated policy for future contacts.
- Assistance for participants in defining next steps for achieving personal goals.

10. An **evaluation process** based on:

- Outcome analysis of program and relationship.
- Program criteria and statement of purpose.
- Information needs of board, funders, community partners, and other supporters of the program.

Source: National Mentoring Working Group, convened by United Way of America and The National Mentoring Partnership, 1991