A guide for mentees and mentors
INTRODUCTION

What Is Mentoring?
Mentoring is a professional relationship in which an experienced person (the mentor) assists another (the mentee) in developing skills and knowledge to enhance the less-experienced person’s professional and personal growth.

What Is PICPA Mentor Match?
The PICPA’s Mentor Match pairs willing mentors with eager mentees who want to advance their career goals. By entering search criteria into Mentor Match on the PICPA website, members are matched with a fellow PICPA colleague based on the professional skills the mentee wants to acquire and the skills that the mentor has to offer. While the goals of each mentee will vary, the role of the mentor will remain consistent. Mentees will develop a specific set of goals as the basis of the relationship, and mentors will work with the mentee on advancing these objectives. This program is not about finding a job. It is about professional growth and networking.

To have the best possible partnership, the mentor and mentee must clearly understand their roles. All mentees and mentors are required to adhere to the following guidelines:

**Mentor Match Requirements**
- Both the mentor and the mentee must be PICPA members.
- To participate, mentees and mentors must enroll on the PICPA website.
- Mentors may have a maximum of three mentees at a time, but need to be judicious with their resources to make sure that each mentee is well-served.
- Mentees may only have one mentor at a time.
- Participants are asked to make a six-month commitment. At the end of this time, mentors and mentees can continue their relationship as they see fit.

**The Basics**
- The mentor must complete a profile via the PICPA website. Once completed, the mentor becomes available as mentees search for potential matches.
- It is the responsibility of the mentee to reach out to the mentor when he or she finds a potential match. The mentor’s contact information will be available in the Mentor Match search results.
- Mentor Match is a self-managed program. The PICPA’s role in the Mentor Match program is to serve as the platform whereby mentors and mentees are matched.
- Occasionally, you will receive correspondence from the PICPA regarding your participation. For the specific roles of the mentor and mentee, please review the Roles of the Mentor and Mentee section.
- You will receive an annual email from PICPA staff asking if you wish to remain on the mentor/mentee list. You can also opt out at any time by contacting Sara Albert.
- Questions regarding PICPA Mentor Match can be directed to Sara Albert.
Mentoring is about helping people progress in their development. A mentoring relationship is not stagnant. Most mentor/mentee relationships progress through the following stages:

1. **BUILDING RAPPORT**
   - Getting to know each other and agreeing on the basis for working together.

2. **SETTING DIRECTION**
   - What are the issues to be tackled? What are the priorities?

3. **MAKING PROGRESS**
   - This is the action portion of the relationship, with regular contact and activity.

4. **MOVING ON**
   - The purpose of the partnership has been achieved.
The Role of the Mentor
Mentors are asked to embrace a supportive and nurturing role, encouraging their mentees’ professional development and growth.

Expectations:
- Mentors meet with their mentees at least once per month (either in person, over the phone, or virtually).
- Mentors lead the first introductory call within 10 days of a successful Mentor Match.
- When mentees give mentors discussion topics in advance, mentors are encouraged to think about relevant resources and experiences.
- Mentors are expected to participate in calls and meetings in a timely manner, and to provide as much notice as possible if they need to reschedule.
- Mentors are expected to be professional, courteous, and gracious in every interaction with their mentees.
- Mentors are expected to participate in a six-month review of the program, and to discuss results with the mentee.

The Role of the Mentee
The mentee is responsible for driving the relationship. It is the responsibility of the mentee to establish their goals, be clear about what they hope to get out of the relationship, and do self-check-ins to ensure the mentor/mentee relationship is working.

Expectations:
- Mentees are responsible for initiating the relationship.
- Mentees should determine meeting schedules and to communicate at least once per month with their mentors.
- Mentees should be prepared with questions and goals to work on with their mentor during each scheduled session. A suggested best practice is to share topics for conversation a week before the call to give the mentor time to prepare.
- Mentees should set realistic goals for what can and should be achieved through the mentor/mentee relationship.
- Mentees should be prepared to receive honest feedback and constructive criticism.
- Mentees will implement agreed upon action items and update the mentor on the progress.
- Mentees are expected to participate in the six-month review of the program, and to discuss results with the mentor.
INTRODUCTORY CALL CHECKLIST

Review this checklist to prepare for your initial call or meeting.

When preparing for a first-time meeting, MENTORS should:

- Summarize goals and expectations for the mentoring relationship.
- List two to three topics to discuss with the mentee.
- Consider what you want from the mentor experience.
- Consider availability for future meetings.

When preparing for a first-time meeting, MENTEES should:

- Summarize personal and professional goals.
- Consider short-term and long-term goals.
- Consider what you want from the mentoring experience.
- Be prepared to discuss ideas or concerns for achieving goals.
- Consider the desired frequency of meetings.

MENTORS should consider asking the following questions:

- How do you use your skills on the job?
- Which skills do you want to develop?
- What are some of your key accomplishments and areas of growth over the past three to six months?
- Which two or three areas have caused frustration or did not meet your expectations over the past three to six months?
- What do you perceive as your top priorities for personal and professional growth over the next year?
- How do you like to spend your free time?
- Who do you admire personally and professionally? Why?

MENTEES should consider asking the following questions:

- Have you had past successes mentoring individuals?
- I’m seeking (specify) skills for my personal and professional development. Can you help me attain them?
- What expectations do you generally have of the people whom you mentor?
- How much time can you offer?
- How do you plan to offer feedback?
MENTOR TIPS FOR A SUCCESSFUL INTRODUCTORY CALL

• **Introduce** yourself and who you work for.

• **Describe** how the call will proceed.

  The purpose is to “get to know each other.”
  “We’ll discuss the goals of the mentoring relationship.”
  At the end of the call, jointly decide whether it makes sense to proceed with a mentor/mentee relationship.

• **Review** some of the questions listed in the Introductory Call checklist.

• **Explain** what mentoring will look like based on your style. Will you just answer questions? Will you ask the mentee questions? Will you proactively provide resources, or will you wait to be asked?

  “Expect me to challenge you.”
  “Expect goals and homework.”
  “Expect ups and downs.”

• **Ask** “How do you want to be mentored?”

  Consider professional boundaries.
  Consider preferred communication methods and styles.
  Does the mentee want to keep meeting logs, records of goal setting, etc.?

• **Discuss** the confidential nature of the relationship.

• **Confirm** that initiative and change always comes from the mentee.

  While the mentee will drive the relationship, it is always worth sharing your expectations to help you and the mentee agree to the relationship.

• **Confirm** that there will be monthly meetings. Suggest certain dates and times to either meet in person, video conference, or speak on the phone. While some correspondence between meetings is expected, fully commit to monthly appointments.

  Set your expectations for any changes to the schedule.
  “I would like at least 48-hours’ notice of cancellation of our scheduled meetings, except in the case of emergency.”

• **Mutually commit** to at least six months together developing the relationship.

  Agree to the completion and discussion of a six-month review form.

• **Schedule** your next meeting: including date, time, and expectations.

• **Schedule** your six-month “assessment” date on the calendar.

Other considerations:

• Consider how formal/informal you want meetings to be, and express that to the mentee.

• With whom do you need to share information about this mentor/mentee relationship? (i.e., HR staff, peers, professors, spouses, etc.)

• How are concerns resolved on either side?
SETTING DIRECTION

ESTABLISH NEEDS & SET PRIORITIES

This is the foundation stage for the mentoring relationship. As the relationship progresses, revisit these points to ensure the original goals and milestones are being met.

Goal Setting

Below is a generic approach that may help establish issues and priorities:

• Clarify the Mentee’s Needs
  What is the mentee’s current situation?
  What is his or her vision for their future?
  What are the barriers that could get in the way?

• Explore the Situation
  What does the mentee bring to the situation (strengths and weaknesses)?
  What is the context? What is happening around the mentee?
  What supporting evidence can the mentee offer (views of others, performance reports, etc.)?

• Develop a Plan
  Set goals
  Set milestones
  Set priorities

• Check Commitment and Capabilities
  Is the mentee prepared to act on outcomes?
  Can the mentor commit to a certain number of meetings per year?
  Can you tackle the mentee’s goals together?

Venue/Location

You may find it helpful to vary the location of the meetings to match the need of each meeting. For instance, during goal-setting meetings it might be necessary to host the meeting in an office. When doing updates and check-ins, meeting for coffee might be a good option. In either case, both the mentor and mentee should consider the needs of the meeting.

Tips:

• If the mentee is coming to a formal office setting, ensure that he or she dresses appropriately for the work space. (“You should plan to wear a suit and tie [or business casual dress] to our meeting.”)
• Consider the mentor’s and mentee’s view on certain social situations. Avoid inviting the mentee to a social situation where he or she may feel uncomfortable.

Frequency:

• At the start of the relationship, it may be useful to have more frequent meetings, perhaps every two weeks. This frequency will help build the relationship.
• Geography and the schedules of both individuals should be considered. Be sure that both mentor and mentee are giving and taking equally of both time and travel.
• A good strategy is to book two or three future meetings at the end of a session.
• Use email and phone calls between meetings if needed, while being respectful of each other’s time and other commitments.
FOSTERING THE RELATIONSHIP

This is the most productive of stages. It is a period of sustained activity and meetings. The relationship is regularly reviewed and adapted.

When mentoring is at its best, it should appear relaxed and natural. However, it is still important that both the mentor and mentee come prepared to each meeting with specific goals in mind.

Questions for the Mentor to Consider
• What kind of issues does the mentee want/need to address?
• Is he/she ready to address them yet?
• What issues remain from our last meeting?
• What specific insights should I provide the mentee?
• What kind of constructive feedback can I provide?
• Do I have models, documents, or contacts that might be useful?
• How have I helped so far?
• How should we end this meeting?
• What else can I do to help?

Questions for the Mentee to Consider
• What do I want to discuss this time?
• Why do I want to discuss this now?
• What am I avoiding?
• What is important to me?
• What data do I have?
• Are there examples or useful documentation that I can bring to the discussion?
• What outcomes do I want?
• What do I want to say?
• Where would I benefit from another perspective?
• How do I see the mentor helping?
• How am I going to make the best use of our time together at this meeting?

Tools to Consider
• How to Run an Effective Meeting
• Six Tips for Mentees to Prepare for Meetings with a Mentor
• 10 Killer Questions to Make the Most of Your Mentor Meeting
• Maximize Meeting with Mentor
• Crafting a Mentor Meeting Agenda
ASSESSING THE RELATIONSHIP

At some point, both the mentor and mentee will achieve their goals for the relationship. At that point, it is probably appropriate to allow the formal mentor/mentee relationship to end.

Tips for closing out a mentoring relationship:

For Mentors

*Give advance notice.* If you, the mentor, wish to end the mentoring relationship for any reason, it’s important to alert the mentee as soon as you are certain that this change is imminent.

*Wrap things up.* Give the mentee the opportunity to close out any remaining tasks or projects that he or she was working on with you.

*Focus on progress.* Reflect on progress and positive changes that the mentee has made since the relationship began.

*Provide direction for the future.* Use your final session to focus on future goals and continued development.

*Be straightforward and realistic.* While you may have the urge to continue the relationship informally, it is best to be honest about what you can realistically provide to the mentee.

**Example:** Rather than stating, “Call me anytime,” you might simply say, “I wish you well. Please keep me posted on your progress with an occasional email.”

For Mentees

*Communicate.* You may feel awkward or confused about ending the mentoring relationship. The good news is your mentor will understand! By communicating that you would like a change, you are freeing up yourself and your mentor from a commitment that may have served its purpose.

*Meet in person.* When discussing the end of the mentoring relationship, an in-person meeting is preferred. If logistics don’t allow for an in-person meeting, a phone conversation is appropriate. Do not end the relationship with an email or without saying anything at all.

*What do I say?* Begin with a clear statement about how you see your career and relationship currently. Explain how your situation has changed, and express gratitude to the mentor for his or her time and contribution to your progress.

*Provide specifics.* Providing a list of the specific ways the mentorship has benefitted you will not only give the mentor a positive feeling about the relationship, but will also serve as a way for you to see how far you have come since the mentoring relationship began.

*Write a thank you note.* Within a few days of your final meeting, write and mail a thank you note to your mentor.

*What next?* You and your mentor should determine if the relationship will continue informally. Just as the mentor is expected to set realistic expectations about the future of the relationship, the mentee should do the same.

**Resource:** How to Close a Mentoring Relationship
Appendix A – Mentoring Agreement
This agreement is solely for the use of the mentor/mentee. It is not a required component of the PICPA’s Mentor Match guidelines.

<table>
<thead>
<tr>
<th>MENTOR</th>
<th>MENTEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Name:</td>
</tr>
<tr>
<td>Mentor company:</td>
<td>Mentee company or university:</td>
</tr>
<tr>
<td>Preferred mode of communication (circle one):</td>
<td>Preferred mode of communication (circle one):</td>
</tr>
<tr>
<td>In-person</td>
<td>Email</td>
</tr>
<tr>
<td>Phone</td>
<td>Video Conference</td>
</tr>
<tr>
<td>How do you like to receive feedback?</td>
<td>How do you like to receive feedback?</td>
</tr>
</tbody>
</table>

PARTNER AGREEMENT

List your general expectations for this relationship:

What is your preferred frequency of contact?

What is the specific purpose of this mentoring relationship? What do we want to accomplish?
### Mentors – Complete this section and be specific. “As your mentor, I am agreeing to …”
(Ex: Help with your goals, give feedback, respond to your requests within 24 hours, replace any cancelled meetings with another date, etc.)

<table>
<thead>
<tr>
<th>Mentor signature:</th>
<th>Mentee signature:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
<td>Date:</td>
</tr>
</tbody>
</table>

### Mentees – Complete this section and be specific. “As your mentor, I am agreeing to …”
(Ex: Give you feedback on your mentoring skills, respect your time, be responsible for my own development, plan the agenda of our meeting in advance, etc.)

### Our next steps are... – Include due dates
(Ex: Identify next meeting date and agenda, review this mentoring agreement together, etc.)

### Confidentiality Agreement
We agree to the confidential nature of this document. If we choose to discuss the contents of this document with others, we will seek the permission of the other party beforehand. If, at any point during this relationship, we feel it is not working for both parties and we are unsuccessful at resolving any issues, we can choose to end the mentoring relationship without negatively reflecting on either party.
# Appendix B – Meeting Log

Use this log to track your meeting highlights, feedback, and action items.

<table>
<thead>
<tr>
<th>Topics covered</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Action items</td>
<td></td>
</tr>
<tr>
<td>Networking opportunity requests</td>
<td></td>
</tr>
<tr>
<td>Future agenda items</td>
<td></td>
</tr>
<tr>
<td>Other topics for discussion</td>
<td></td>
</tr>
<tr>
<td>Date, time, and place of next meeting</td>
<td></td>
</tr>
</tbody>
</table>
Appendix C – Six-Month Review Form
The following template will help mentors and mentees track progress after six months. This form should be completed and discussed by both the mentor and mentee.

### Mentoring Six-Month Review Form

<table>
<thead>
<tr>
<th>Description</th>
<th>Rating</th>
<th>Additional Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>The mentoring relationship is working well.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meetings are held regularly and as desired by mentee.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>An appropriate amount of time has been devoted to the relationship.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Areas for personal and professional development have been established.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Clear goals and expectations have been set.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trust and confidentiality have been established.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mentor/mentee listens well and is responsive.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Progress has been observed in areas chosen for development.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barriers encountered during mentoring process have been resolved.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Topics to be discussed over the next six months have been defined.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The relationship is meeting expectations.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The mentoring relationship should continue.</td>
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<td></td>
</tr>
</tbody>
</table>

Additional comments:

Suggested action items: