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Chapter 9- Defining Recruitment, Selection, and Matching Strategies

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9.

DEFINING RECRUITMENT, SELECTION, AND MATCHING STRATEGIES

Paul Hernandez; Don Busenbark; Kim Hales; and David Law

Abstract

Chapter 9, “Defining Recruitment, Selection, and Matching Strategies” guides the program coordinator in recruiting mentors and mentees, selecting who will be in the mentoring program, and matching participants. The section on recruitment begins by emphasizing how the needs assessment, university vision, and program goals and objectives should align to create a clear vision and purpose for the mentoring program. It also describes how communication practices in various university ecosystems, rewards and incentives, and activities enhance enrollment. The section on selection delineates mentors’ positive and negative characteristics, exploring in-depth critical mentor communication skills and the characteristics of successful mentees. Finally, the last section helps the program coordinator consider the multiple alternatives in the matching process.

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Introduction

This chapter is practical and directly impacts how the program coordinator will engage with mentors and mentees and how mentors and mentees will engage as dyads or groups, depending on the typology used for the mentoring program (Chapters 3 and 27). There are three main sections in this chapter. The first section focuses on recruitment and begins by emphasizing that, when aligned, the needs assessment, university vision, and goals and objectives create a clear purpose for the program. The second section, focusing on participant selection, describes the desired characteristics of mentors and mentees, emphasizing the need for mentors to be skilled communicators. The third and final section describes the processes needed for effective matching and how mentor and mentee characteristics may factor into the matching process.

Recruiting Mentors and Mentees in Academia

Academic recruiting practices have received less attention than selection and matching strategies. Past writings on recruiting encourage mentees to choose mentors carefully based on desirable characteristics (Campbell, 2007). We begin this section by highlighting practices and processes contributing to effective academic recruitment. First, we examine the need to clarify the rationale for participant recruitment and its ties to institutional alignment. Second, we describe communication practices that impact mentoring. Third, we explain how rewards and incentives can bolster recruitment. Lastly, we offer specific recruitment activities for program coordinators to consider. Implementing the suggested activities positively impacts the recruitment of mentors and mentees into mentoring programs.

Institutional Alignment: Clarify the Purpose and Audience of the Mentoring Program

The program coordinator must clearly articulate *why* a mentoring program is being designed and implemented. To do this effectively, the program coordinator must tie together the needs assessment (Chapter 3), the university's mission and vision (Chapter 6), and the mentoring program's goals and objectives (Chapter 8). Tying these elements together explains why the program is crucial and who it is for. When there is institutional alignment, the reasons for mentoring are evident to university leadership, faculty, staff, and students. This alignment creates buy-in from potential recruits because the program's purpose is clear and relevant to their current and future personal and professional goals. For example, as described in Chapter 28, Babson College's Undergraduate Professional Mentoring Program's purpose is developmentally relevant to junior and senior female business undergraduate students transitioning from life as university students to life after graduation as working professionals. Clarifying why the program is crucial and who it is for will influence the characteristics sought in both mentors and mentees. For example, the recruitment plan for selecting mentees in Chapter 23, designed to address concerns by faculty of color regarding feelings of isolation and lack of representation, will differ from the recruitment plan in Chapter 24, designed to help all new faculty navigate the tenure process. Likewise, the recruitment plan for selecting faculty to mentor undeclared undergraduate students will differ from a program designed to mentor junior science, technology, engineering, and mathematics (STEM) students with ambitions to attend graduate school. For the first program, the ideal mentor to recruit is empathic, nurturing, an effective listener, and readily available.

For the second program, the mentor may also need to be a STEM scholar willing to mentor students in research and dissemination activities.

We now give specific recommendations for program coordinators to consider as they develop their recruitment plans unique to their institution and the program's purpose.

Recruitment Communication Practices

When considering the communication practices surrounding recruitment, a multifaceted approach is best. Communication should be continuous and reciprocal; program coordinators should employ multiple strategies that reach participants or potential participants at all contribution levels. Hiring practices, onboarding, orientations, and staff/faculty professional development training present occasions to share the benefits and opportunities of participating in a mentoring program. University leadership can prioritize a mentoring culture by facilitating mentoring-specific activities, and program administration can show support by including information about the program in leadership communication chains. Keller (2007) discusses the influence of knowing the benefits and costs on an individual's decision to participate in mentoring. Using this information, program coordinators should take every opportunity to communicate about their program.

Systematically Immersing University Newcomers in Mentoring

Boyle and Boice (1998) assert that effective mentoring begins with university-wide systemic efforts to immerse newcomers (students, faculty, and staff) in support programs that give them a sense of connectedness. University leaders can enhance the overall mentoring culture and recruitment into mentoring programs by deliberately and intentionally communicating about mentoring. As explained by the National Academies of Sciences, Engineering, and Medicine (NASEM), department heads and academic deans can structure job recruitment, application procedures, interviews, and selection procedures to make it evident that new faculty and staff are expected to be committed to mentorship, both as possible mentees and mentors (NASEM, 2019). For example, in addition to the standard vita and cover letter for academic positions, department heads could also require a mentorship philosophy statement as part of the required application materials. Similarly, faculty can assess graduate students' openness to a mentoring culture throughout the interview process. Supervisors or faculty should present options for mentoring during new-hire or new-student onboarding processes and graduate-student orientations.

It is common for universities to have plans for recruiting new undergraduate students, orienting them to university life, and optimizing their first-year experiences. Discussing the positive aspects of receiving and giving mentoring in orientation and first-year experience programs is the beginning of these students engaging in a culture of belonging. Chapter 19 describes how one undergraduate first-year experience program recently expanded its intensity by integrating a yearlong mentoring experience with a faculty member.

Continuous Discussion of Mentorship From University Leadership

University leadership, including department and college leaders, can prioritize mentorship by

supporting tested curricula and tools for mentoring and discussing these frequently in sponsored meetings. In addition, department heads and deans should regularly share program metrics provided by the program coordinator regarding data on the mentorship process and outcomes (NASEM, 2019). They can also encourage time for professional development by engaging in such activities as attending professional conferences and reporting back to the sponsoring unit what the attendee has learned.

Program Coordinators Communication Plan

As described in Chapter 7, developing a communication plan occurs in Phase 3, Designing the Program. The communication plan developed by the program coordinator provides dissemination details of the mentoring program throughout the university. University ecosystems are complex, and program coordinators should be thoughtful about how often and what content should be disseminated to the various stakeholders, including mentees, mentors, university leaders, and other sponsors such as advisory or governing boards. The communication plan might be as simple as setting up a workgroup email, online discussion board, recurring meetings (in-person or virtual), a regular newsletter, an institutional website, a bulletin board with flyers, or other electronic or hardcopy means of spreading the news about the program. Communication plans must share data on mentorship processes and outcomes with all stakeholders. This communication plan should detail how department heads, deans, and other university leaders disseminate program data to their constituencies. One group of stakeholders is critical to keep informed—mentors. Keeping good mentors in the mentoring program is crucial to the program’s long-term sustainability. One way to maintain good mentors vested in the program is to share with them the success stories of mentees and progress toward the program’s goals. When mentors feel like their involvement positively impacts mentees’ lives, they are more likely to remain committed participants. One common goal of mentoring programs is to increase feelings of belonging. Chapter 12 and recommendation 2.3 in this book’s conclusion section note that it is highly encouraging when program coordinators share positive data about increased feelings of belonging; this may motivate both mentees and mentors who are not yet participating.

Rewards and Incentives

Further research is needed to verify whether providing external benefits or incentives improves the quality of mentoring or the desired outcomes for mentees (Campbell, 2007). While research on incentives is lacking, what we can state with confidence is that, according to Wolfe (1992), “the incentives and rewards associated with mentoring send a powerful message about the value accorded to the role” (p. 107). Institutional leadership can reward and visibly acknowledge faculty mentors for documented, effective, and inclusive mentorship (NASEM, 2019). Beginning with the provost’s office, academic leaders may revise the faculty code and job descriptions to grant similar value to mentorship as assigned to research and teaching. Provost’s offices and centers for faculty development may provide training on effectively documenting mentorship through reflective statements about how they have worked to improve their mentorship over time, similar to reflective statements regarding research and teaching. Department chairs and academic deans can use annual reviews of performance, promotion, and tenure practices to reward effective mentorship. Faculty can include student testimonials and measurements regarding the quality of the mentoring relationship in their promotion dossier. Department chairs can also consider reducing research and teaching responsibilities as an incentive to participate in the mentoring program’s leadership role. While more

formalized than faculty evaluations, university staff also have evaluative processes in which staff supervisors can apply similar rewards and incentives.

Similar to incentives for mentors, offering funded activities or other rewards for participating in a mentoring program is a tangible way for university leadership to demonstrate the value of the program and the mentor role. Funding mentor-mentee activities can include providing snacks or meals during finals week and hosting mentor-mentee dinners, tastings, or gatherings. Program coordinators can seek funding from the administration, grants, or donations. Additionally, indirectly funded activities are also options that can significantly incentivize mentoring. For instance, Purdue University's College of Science partnered with university residences to host "Feasting with Faculty," a program designed to facilitate faculty joining students for meals in the campus dining halls. According to Dennis Minchella, associate dean of the College of Science, this program is "a way to allow students to be more comfortable in a student-faculty setting" (Piotrowicz, 2011).

Recruiting Activities

Depending on the mentoring program's purpose, mentors and mentees could be undergraduate students, graduate students, staff, or faculty. For example, an upper-division undergraduate student may be a mentor to a first-year undergraduate student. A more experienced faculty administrator may mentor a senior-level staff member seeking administrative leadership opportunities. The recruitment activities we describe may apply to both mentee and mentor or just one of them, depending on the typology and purpose of the mentoring relationship. For example, advertising a mentoring program in course syllabi to recruit mentees and mentors for a peer-to-peer mentoring program would be more practical for recruiting students rather than recruiting staff. We will leave it to the discretion of the program coordinator to determine which activities would be appropriate for their program. Our recommended timeline is to work with key partners to assess recruiting activities and a timeline in the last spring before the end of the calendar school year. Because the best time to reach the target audience is the beginning of the school year, planning before participants are off contract for the summer months is vital. We recommend working with the administration to utilize summer staff for developing mailing lists and preparing other recruiting materials or activities. If your program is at multiple campus locations, coordinating in the springtime increases the efficiency of the overall recruiting model to be implemented in the upcoming academic year.

Following the recommended recruitment timeline at the beginning of the school year will work well for recruiting faculty and staff. In addition, encouraging participation in the mentoring program early helps new employees to understand that there is a mentoring culture in the organization. It will reduce the number of missed new employees in the recruiting process.

Marketing Materials

Marketing materials are an essential part of any mentoring recruitment program. Your materials may include information about program requirements such as who is eligible to participate, activities, frequency of meetings, mentoring experiences, benefits of being involved in mentoring, and reports on mentoring. "Advertising and recruitment should emphasize the reciprocal benefits of participation to enhance the image of the mentor relationship as a partnership rather than a missionary one" (Redmond, 1990, p. 195). Highlighting the reciprocal benefits of mentoring is essential for recruiting

mentors and mentees to your program. Personal mentoring stories are another vital factor in the mentor's and mentee's decision to participate in the mentoring program (Putsche et al., 2008). The "tone of the recruitment materials is likely important for attracting dedicated and reliable mentors" (Garringer et al., 2015, p. 15).

Marketing materials can come in various formats: email, flyers, posters, rack cards, mailers, testimonials, videos, and websites. In addition to being consistent on all materials, the information in each format should explain why mentees should participate in mentoring and how and where to sign up for the program. When considering marketing materials, it is essential to consider your organization and desired participants and the best ways to contact them. If your organization has a social media account, that would be a place that could help promote the mentoring program. Social networks effectively communicate ideas and programs (Powell & Ralls, 2009). Know your audience. For example, if you are recruiting student mentees and students receive multiple emails from your organization, emailing them may not be the best method of contact since they may tend to ignore emails from the organization. Program coordinators should send faculty, staff, and students' emails individually rather than using bulk email lists; personal messages are much more apt to get the attention of busy mentor recruits.

If you use marketing materials to recruit mentors and mentees, "it is important for mentoring programs to realistically describe the requirements, rewards, and challenges of mentoring during this recruitment phase" (Garringer et al., 2015, p. 12). Mentors may be more motivated to participate in the program if they understand its benefits to themselves and others (Lunsford, 2016).

Chapter 7 outlines the program coordinator's role in the mentor and mentee recruiting process. Coordinators should be involved in the process of creating or approving marketing materials. They can also help with providing posters or informational media, posting messages to social media, sending email messages to faculty and staff, speaking to undergraduate students, speaking with student leaders, speaking with faculty and staff concerning the mentoring program, and so on. (Putsche et al., 2008; also see Chapter 7 in this volume). The program coordinator must meet with potential mentors and mentees to recruit participants, help explain the program, and answer any questions or concerns. Whether you are recruiting mentors or mentees to the program, "recruitment materials need to be designed to attract and engage appropriate target audiences whose skills and motivations best match the goals and structure of the mentoring program" (Garringer et al., 2015, p. 15). "Providing the right content will help you recruit the right people who will be active participants" (Lunsford, 2016, p. 216).

Course Related (Syllabi)

Besides using marketing materials to recruit students to the mentoring program, faculty can encourage participation in the mentoring program through their syllabi. For example, adding an extra paragraph in a faculty syllabus about the mentoring program with the benefits of the program and how to join would be another impactful method for recruiting students. In addition, for organizations utilizing faculty syllabi, it would be good to provide a template recruiting statement for inclusion in the syllabi. Appendix A shows an example of such a statement.

If the university uses a learning management system (LMS), faculty could include information on the

LMS for students to see as part of the regular course. This LMS can give students knowledge and links to the websites where students can register for the program and find more information. In addition, having faculty recruit students to the mentoring program provides another point of contact for students and allows the faculty to find students they can mentor.

Events

While marketing materials and faculty syllabi can effectively recruit students, there are other options as well. Events such as open houses, carnivals, student orientations, and faculty and staff meetings are just a few of the events that program coordinators can incorporate into a mentor and mentee recruiting plan. In addition, program coordinators could help facilitate the events, allowing potential mentors and mentees to interact and determine matches for the mentoring program.

Personal Contact

During recruiting, the program coordinator should seek accomplished faculty, senior staff, administrators, other employees, and students with the appropriate characteristics and qualities to contribute to an effective mentoring program (McCann et al., 2010). In addition, coordinators and university administrators should contact faculty, staff, and students through personal invitations to join the mentoring program (Redmond, 1990). Personal contact for recruiting mentors into the program is the most impactful method for generating interest (Putsche et al., 2008).

Not every potential mentor or mentee understands the advantages of the mentoring program. Not all potential mentors or mentees will attend all the activities or even learn about the program. Another option to consider for recruitment would be a calling campaign. Using the university resources and working with a mentoring committee, the students, faculty, and staff could be called individually and invited to participate in the program. A calling campaign effectively targets students, faculty, and staff identified as potentially benefiting from a mentoring experience about the program. We recommend that the program coordinator provide a guiding script to ensure a cohesive message (See Appendix B as an example of a guiding script to recruit student mentees).

Whether the prospective person decides to participate in the program or not, it is an opportunity to create connections with a student, faculty, or staff members. Personal contact lets them know you care and want what is best for them. Potential mentors or mentees may join the mentoring program later as they continue to hear more about the benefits and opportunities of involvement. Working with academic advisors can be another point of contact for recruiting students into mentoring programs. Redmond (1990) found that personal connection with students from the admissions office or other educational programs can help with recruiting.

Communicating the organization's mentoring culture should be precise and targeted to all potential participants in the program. Communication is vital to everyone involved in mentoring programs. For example, Crocket and Smink (1991) found that communication of success and positive outcomes in a mentoring program stimulated enthusiasm for the program and helped to maintain the momentum.

Selection: The Role of Characteristics in the Selection Process

For any mentoring program to succeed, it is vital to select mentors and mentees carefully (Matthews, 2003). As described earlier in this chapter, the first step in the recruitment, selection, and matching process begins by clearly articulating the purpose of the mentoring program and who it is for. The program's purpose and the number of mentees seeking the program will help decide the program typology, such as hierarchical, peer, group, reverse, or developmental network (see Chapter 3). The typology of the program will affect the recruitment plan and the desired characteristics sought in mentors and mentees (Mathews, 2003). For example, if the program's goal is to promote resiliency among vulnerable undergraduate students (Kupermine et al., 2020) and there is limited access to faculty as mentors, a group model may be best. Program coordinators could design this group model to provide exposure to a wide array of mentoring forms (e.g., hierarchical, peer-to-peer, reverse) by giving vulnerable students access to peers at their same level, more advanced students within the institution, and a faculty mentor.

Selection of Mentors

The attributes of the mentor will vary, depending on the program's purpose and desired outcomes (see Chapter 8) and whether the outcomes will be best achieved using a hierarchical, peer, group, reverse, or networked typology (see Chapter 3). Recognizing that it is an iterative process, coordinators will need to know at some point how many mentors will be available as they implement their program. Hierarchical or reverse typologies will likely have fewer available mentors than peer or group typologies will. The characteristics we describe generally apply to all mentors, regardless of typology. Coordinators should select mentors carefully for the characteristics they possess and traits they do not have (Johnson & Huwe, 2002). In the selection process, mentors must possess the desired characteristics to help the program achieve its outcomes. Both the positive and negative characteristics program coordinators should consider when selecting mentors are described in the following sections. Communication skills are often grouped within the positive characteristics category; we have parceled communication skills from other positive attributes to distinguish the importance of these skills.

Positive Characteristics

In the book *The Psychology of Interpersonal Relationships*, authors Berscheid and Regan (2016) characterize a dyadic relationship as having frequent, emotionally pleasant interactions combined with consistent and stable caring. While this definition is simple, it highlights many of the needed characteristics for mentors to possess to have effective relationships with mentees. Chapter 10 of this book describes how personality characteristics like empathy and a sense of humor can help the mentor bond with the mentee. Humor creates an environment where the mentee feels more open to express themselves, thus building rapport and creating emotionally pleasant interactions. Campbell (2007) describes other personality characteristics that lead to emotionally satisfying interactions, such as warmth, self-awareness, integrity, and honesty. By displaying empathy, mentors can support and reassure the mentee in a judgment-free zone—this ability to be empathetic forms the bedrock of psychosocial support.

The characteristics mentioned thus far are personality related. Other behavioral characteristics

include productivity, respect for colleagues, availability, and a strong mentoring history (Campbell, 2007). Because these characteristics are behavioral, they are observable to the mentee. Powerful learning occurs when mentees observe these positive characteristics in action. Through this process of observational learning, the mentor becomes a role model, and the mentee will tend to take on these positive characteristics through imitation, identification, and introjection (Bandura, 1977).

Negative Characteristics

As described in Chapter 10, marginal or poor mentoring can be an Achilles' heel in formal mentoring programs in academia. Poor mentoring may result from mentors agreeing to participate who lack the necessary positive skills and possess negative characteristics. A critical negative factor is a poor history of mentoring. For example, a person with a poor record of mentoring may be narcissistic. Mentors who are narcissistic may have feelings of grandiosity, which limits their ability to be empathetic and offer compassion and comfort to distressed mentees. Narcissistic mentors may be self-serving and promote personal interests over those of mentees (Chopra et al., 2016). In addition, ineffective mentors often view themselves as too busy, making it challenging to access mentoring meetings. Chopra and colleagues (2016) found that the more successful mentors become, the more they risk having too little time for day-to-day interactions with their mentee. Rather than seeing the altruistic and generative nature of mentoring, ineffective mentors perceive it as an onerous add-on duty that detracts from their research or teaching work. Other negative personality characteristics for program coordinators to avoid include low self-awareness, academic and intellectual insecurity, feelings of inadequacy, and a conflict-avoidant personality (Campbell, 2007; Chopra et al., 2016). Low self-awareness can be especially harmful, as it may correlate to sexist or racist attitudes, unethical behaviors, and, according to Johnson and Huwe (2002), even boundary violations.

Because marginally competent mentors often interact with mentees in a manner that sabotages mentees' development, it can lead to dissatisfaction and hinder the program's ability to fulfill its purpose.

Communication Skills

In the literature describing the positive characteristics of a mentor, effective communication skills are included among the desired characteristics. For Chapter 9, we have parceled communication skills from other desirable skills to emphasize the critical nature of these skills in effective mentorship. While all typologies require great mentors to communicate effectively, some offer more opportunities. For example, because of the complexity of various forms of group mentoring, mentors have increased opportunities to develop communication skills such as knowledge sharing, collaboration, and negotiation (Huizing, 2012).

In developing the Ideal Mentor Scale, Rose (2003) found that doctoral students seeking faculty mentors identified that the two top characteristics of an ideal mentor are a mentor who (a) communicates openly, clearly, and effectively and (b) provides honest feedback (both good and bad) about the mentees' work. We anticipate that other university subsystems, such as undergraduate students, staff, and faculty, would also place a premium on effective communication skills in a mentor. Therefore, this chapter organizes communication skills into listening, questioning, and feedback skills.

Organizing these communication skills also provides a simple and effective framework for program managers to frame mentor training.

Listening Skills. Active listening skills from mentors invite mentees to self-disclose. Mentee self-disclosures may center on the mentee's history, strengths, goals, and opportunities. When mentors actively listen to mentees' strengths, it creates the desired warm emotional climate, forming a dyadic bond. As this process continues, trust develops, which invites the mentee to share their strengths, challenges, and hardships, which may promote feelings of vulnerability within the mentee. When the mentor receives the mentee's feelings of vulnerability with compassion, understanding, and support, a deeper bond develops, and the mentee experiences the mentor as a valued, dependable ally. While all typologies require mentors to be effective listeners, peer mentoring stimulates many opportunities for listening as the individuals have similar power status, thus fostering a safe environment for listening, sharing, and developing trust (Buck, 2020). Chapter 10 provides specific tips to improve active listening skills.

Questioning Skills. Questioning skills help clarify mentees' ambiguity. Examples of obscurity for a faculty mentee might center around fears they have about readiness regarding being promoted from associate to full professor. Senior undergraduate students' ambiguity might center around life after graduation and whether they should enter the workforce or choose graduate school. Open-ended, clarifying, and probing questions invite the mentee to self-reflect and problem-solve. In addition, probing questions from the mentor will encourage the mentee to delve deeper into their thoughts, feelings, and wants regarding a concern, which will deepen their vulnerability, thus providing the mentor more opportunities to connect and create a warm, positive emotional mentorship climate.

Feedback Skills. As mentioned in the opening of this section, mentees value open and honest feedback, even when honest feedback may be challenging to hear. When mentees feel like their mentor cares about and supports them, they will be able to receive feedback constructively because they know that the mentor is providing feedback to help them achieve their goals and purpose. Influential mentors will provide feedback in a manner that is direct and facilitates guidance about what actions are appropriate for the mentee to take. As noted in Chapter 10, the mentee can easily modify tasks or assignments by keeping the feedback simple, thus helping them build confidence and self-efficacy. It is important to note that mentors should not duplicate services already offered by other entities, such as advising, counseling, or human resources. Mentors should avoid being overly proscriptive; instead, mentors should provide constructive feedback that supports mentees' psychosocial needs (Lunsford, 2016), connects mentees to resources (such as counseling or advising services), and assists mentees with their goals as they continue in their program. Wolfe et al. (2008) suggested that mentors should help mentees with goals, develop strategies for improvement, and, if applicable, provide resources for potential career opportunities.

Selection of Mentees

Selection of mentees to a mentoring program is an integral part of the program's success for both mentors and mentees. Unfortunately, most of the mentoring research focuses on the mentor's characteristics and dispositions and does not look at the characteristics and dispositions of mentees.

More research is needed to determine what characteristics or dispositions are essential for mentees in a successful mentoring program.

Lunsford (2016) determined that the program goals should help determine the “right people” for the program. “Identifying the population to be served should be based on the needs of the university” (Redmond, 1990, p. 195). Research suggests identifying a target population and initiating a targeted effort to ensure eligible candidates are selected for the program (Campbell-Whatley et al., 1997; Garringer et al., 2015).

One consideration in mentee selection is targeting those most likely to benefit from a mentoring experience; honor students, student-athletes, junior faculty, and even adjunct instructors all face unique challenges that mentoring can address. For example, suppose the purpose of the mentoring program is to help undergraduate students achieve their educational goals. Engle and Tinto (2008) found that low-income, first-generation students struggle most and need additional support to improve retention and graduation rates. “Being a first-generation student confers its greatest liability in [the] initial adjustment to, and survival in, postsecondary education” (Pascarella et al., 2003, p. 429). Campbell and Campbell (1997) used a targeted population of underrepresented ethnic groups and students with undeclared majors as criteria to select for their mentoring program research. “Selection criteria can [also] include the number of suspensions, academic failures, and absentees.” (Campbell-Whatley et al., 1997, p. 364). Whether the mentee is a student, staff, or faculty, the mentoring program should focus on those who can most benefit or with the greatest need for the program’s support.

Besides targeting specific groups for the mentoring program, we suggest that mentees’ characteristics include “willingness to learn, curiosity, work involvement, and some level of communication competency” (Ragins & Kram, 2007, p. 261). The *Guidelines for Coordinators* manual for the Future Harvest Centers mentoring program (CGIAR, 2006) recommends screening mentees based on enthusiasm, professional interests, availability, and career goals. Menges (2016) found that in selecting mentees, they will be more successful if they have traits of “openness to experience, conscientiousness, extraversion, agreeableness, and neuroticism” (p. 102).

Chapter 11 recommends that mentees should be ready and willing to participate in the program and that being self-directed will help them to succeed. There are five dispositions that mentees should have that program coordinators should consider when making selections: being ready, willing, and able to engage and connect; being willing to try new skills and strategies; being willing to co-construct new knowledge; being able to develop efficacy for learning; and being able to set and work toward goals.

Mentees should also be motivated. Huwe and Johnson (2003) recommend that mentees have emotional stability, have an internal locus of control, are coachable, are emotionally intelligent, and have a high need for achievement. They also recommend that mentees have strong communication skills and clear future goals. “The right people are those who see the program as meeting their needs or who are interested in achieving the program’s stated goals” (Lunsford, 2016, p. 74).

Lastly, when selecting participants as mentees, they must have “skin in the game.” Meaning students are willing to be involved in the program and take ownership of aspects directly related to their experience. Hudson (2013) found that the enthusiasm of mentees was a desirable attribute for a

successful mentoring experience. Crockett and Smink (1991) suggest that mentees “must demonstrate an interest in the program, the opportunities it offers, and a chance of success” (p. 28). They also should “sign a contract outlining commitments and expectations” (p. 28). Some universities require students and mentors to complete a formal application that provides information for the selection and matching of students based on the profiles of the participants (Redmond, 1990).

Matching

Of the three main sections in Chapter 9, recruitment, selection, and matching, this third section on matching has received the most evaluation and research. This section highlights who does the matching and when the matching will occur. How much input participants have in the matching process is described next. Lastly, we consider the research on how similarities and differences may impact mentorship and the implications for program coordinators to consider in the matching process.

Who Does the Matching? When Should Matching Be Done?

In Figure 7.1 of Chapter 7, participant matching occurs in Phase 4 of implementation. While matching occurs in Phase 4, the matching plan is influenced by what happens in the first three phases. For example, determining the typology of the program in Phase 1 will inform how many mentors are needed, with more required for a hierarchical program than a group program. In Phase 2, determining what data to collect on participant characteristics will inform the matching processes, described fully in the following section on similarities and differences. Finally, in Phase 3, recruiting participants determines how many mentors and mentees will need matching. As the program coordinator and others involved in the program design work through these first four phases, they must settle on who does the matching. If program designers do not give participants input into the matching process, then the designers must determine who will do the matching. The matching may be done entirely by the program coordinator in smaller programs. In larger programs, a matching committee may match participants. The matching process is enhanced when the various relevant university stakeholders participate on the matching committee. For example, the matching committee for an undergraduate mentoring program may benefit from including an academic advisor who knows many students. Matching committees may also benefit by utilizing mentoring software that can help identify characteristics of ideal matches with mentors and mentees.

In addition to identifying who does the matching, program designers also determine when the matching will occur. Because universities have a natural rhythm, dates for completing the matching are often determined by the academic calendar, with most mentoring programs starting at the beginning of the academic year. The following section describes the process of matching when participants give input.

Input From Mentors and Mentees Into the Matching Process

As program coordinators and others that help design the mentoring program plan their matching strategies, they should consider whether they want the mentee and mentor to have input into the matching process. When an informal mentoring relationship develops, both mentor and mentee engage voluntarily. Mentor and mentee choose to form a dyad because of mutual liking and identification

(Ragins & Cotton, 1999). Therefore, as program coordinators consider their matching process, informal mentoring can teach how mentoring relationships develop. Informal mentoring relationships develop voluntarily and with input from both dyad members. Allen et al. (2006) studied these two constructs, voluntary participation, and input into the matching process. They found that voluntary participation was unrelated to the dependent variables of interest. However, input into the matching process was associated with greater mentorship quality, career mentoring, and role modeling. These authors, along with Lumpkin (2011) and Bell and Treleaven (2011), stress that when mentors and mentees have input into the matching process, they may start to invest in the relationship early and feel greater motivation to maximize the mentorship. This feeling of ownership not only empowers the mentee but may also motivate the mentor to engage early with the mentee enthusiastically. Lumpkin also notes that this process of the mentee choosing their mentor will expose them to a broader possible network.

Many researchers have noted the importance of input from both dyad groups during the matching process. Allen et al. (2006) discovered that mentors show more substantial commitment to their role when giving input during the matching process. We acknowledge that this area of matching needs further research, as some studies, such as that of Ragins et al. (2000), found that input into the matching process did not produce more positive results than matching without input from participants. However, because the match “is a critical step in the mentoring program, (and) introductory experiences set the tone for the whole relationship” (Chao 2009, p. 315), program coordinators empower mentees and mentors with better chances of success when they seek input from participants. This empowerment creates buy-in by reducing the “awkwardness, anticipation, and anxiety” of meeting an administrative match with whom they may have less in common than a match in which they participated in determining (Blake-Beard et al., 2011).

Factoring Similarities and Differences Into the Matching Process

Of all the topics discussed thus far in Chapter 9, none has received more attention or research than how mentee and mentor characteristics impact the mentoring relationship and how these characteristics should be factored into the matching process to create a good mentee-mentor fit.

In discussing how similarities and differences should factor into the matching process, it is helpful to distinguish between so-called surface-level similarities and deep-level similarities (Eby et al., 2013; NASEM, 2019). Surface-level similarities are readily detectable and include demographic characteristics such as age, gender, and racial/ethnic similarities between the mentor and mentee. Because universities collect these attributes for application and reporting purposes, they are easily accessible. Therefore, the first similarities/differences studied in the matching process were mentor-mentee surface-level similarities. By contrast, deep-level similarities are less easily detectable and include psychological characteristics such as attitudinal, value, and interest similarities between the mentor and mentee. Unfortunately, universities rarely systematically collect these psychological attributes, but the research community has filled the knowledge gap with abundant studies on deep-level similarity.

Over the past decades, the research community has attempted to answer two related questions about mentor-mentee similarities and differences: (a) Do mentees want a demographically similar mentor? and (b) Does having a demographically and/or psychologically similar mentor matter? Research

indicates that the answer to the first question is clear. For example, in their study of diverse undergraduate and graduate students in STEM, Blake-Beard and colleagues (2011) found that women and members of underrepresented minority groups had a *slight* preference for mentors of the same gender, race, or life experiences compared to their male and racial-majority peers (Blake-Beard et al., 2011). Intuitively this makes sense, as it is human nature to be more comfortable and trust people we identify with. Moreover, women and racial/ethnic minorities in college STEM contexts may actively seek demographically similar mentors. Research indicates that identifying similar and counter-stereotypical role models can be particularly important for members of minority or stigmatized groups (Gladstone & Cimpian, 2021).

The answers to the second question are equally clear, if somewhat surprising. First, the weight of evidence shows that surface-level mentor-mentee similarities have almost no impact on the quality of support mentees report receiving from their mentor. For example, in their meta-analysis of 173 studies of mentoring programs in youth, college, and workplace settings, Eby and colleagues (2013) found that surface similarities (i.e., gender or racial/ethnic mentor-mentee similarity) were uncorrelated with the mentee's perceptions of the quality of support received or their overall satisfaction with the mentoring relationship. Similarly, more recent studies in diverse samples of undergraduate and graduate students in STEM contexts have found mainly no or only minimal positive relationships between surface-level similarities and the quality of mentorship support (Blake-Beard et al., 2011; Hernandez et al., 2017; Pedersen et al., 2022). The only caveat to this trend is that mentees with a same-gender mentor report experiencing slightly more mentorship support than their peers. Since the quality of mentorship support is the critical link between access to a mentor and the benefits of mentorship, it is unsurprising that most studies find no impact of surface-level similarity on outcomes such as self-efficacy, grade point average, or intention to persist in a scientific career (Blake-Beard et al., 2011; Hernandez et al., 2017; Pedersen et al., 2022). Second, in contrast to the findings above, mentor-mentee deep-level similarity has a consistent, positive, and substantial impact on promoting the quality of support mentees report receiving from their mentor across contexts and particularly for students from underrepresented groups in STEM (Eby et al., 2013; Hernandez et al., 2017; Pedersen et al., 2022). When taken together, this research supports that matching deep-level similarities is more important than surface-level similarities.

In summary, we can draw two conclusions. First, mentees, especially underrepresented or minority groups, frequently desire to be matched with a mentor based on surface-level attributes such as gender or race/ethnicity. Second, deep-level similarities are more predictive of forming a strong mentoring relationship and the resultant beneficial outcomes than surface-level similarities. So, what are the implications for program coordinators to consider in the matching process?

Program coordinators should identify factors within their control to enhance the development of high-quality mentoring relationships. For example, where possible, allow mentees to have input into the selection of their mentor—surface similarities with a mentor may inform their choice. Further, program coordinators should consider surface similarities in matching, where possible. However, program coordinators should also be cognizant that matching by gender and/or race may overburden mentors from these underrepresented groups.

In addition, program coordinators should actively foster mentor and mentee perceptions of deep-

level similarity. The good news is that perceptions of deep-level similarities are malleable! Research indicates that activities that highlight similarities on various topics (e.g., leisure activities, musical preferences, essential qualities in friends) can engender perceptions of deep-level similarity (Gehlbach et al., 2016, Robinson et al., 2019). Activities can include setting aside time early in the mentoring relationship to participate in a “getting to know you” meeting, which can help mentoring pairs find and affirm commonalities. For example, the “mentor biography interview” in Branchaw et al.’s (2020) *Entering Research* curriculum module can provide a brief and structured opportunity for mentoring pairs to identify everyday life experiences, attitudes, and values (Hernandez et al., 2023). In another example, research indicates that using a “creating birds of a feather” approach to highlight mentor-mentee similarities upon their introduction can boost perceptions of deep-level similarity (Gehlbach et al., 2016, Robinson et al., 2019). This approach involves having both mentors and mentees complete a brief “getting to know you” survey during the application stage (e.g., Which of the following is most important to you? (a) establishing a work-life balance, (b) finding a career connected to my passion, (c) exploring who I am [Robinson et al., 2019]). The program coordinators reveal multiple similar responses to the survey questions to the mentor and mentee upon their introduction (e.g., through the survey platform or via email).

How participants will be matched in a mentoring program requires thoughtful consideration throughout the first four phases of designing the mentoring program (see Chapter 7). Of the three sections in the chapter—recruitment, selection, and matching—processes related to matching have received the most scrutiny and research. When program coordinators develop their matching plan, they need to consider who will do the matching and when it will be done. These specific matching processes will evolve from the natural time cycle of university life as most programs begin at the beginning of an academic year or semester. When appropriate and when possible, we recommend that program coordinators allow for input from mentees and mentors, with particular emphasis placed on input from the mentee. The final part of this matching section describes what program coordinators should factor into their matching processes related to surface-level and deep-level similarities and differences.

Conclusion

This chapter outlines considerations for effective mentoring recruitment, selection, and matching processes. When program coordinators recruit into the mentoring program, it is critical to clearly express the program’s purpose and who it is for. This clarity of purpose occurs when there is alignment between the needs assessment, the university mission and vision, and the program’s goals and objectives. Program coordinators and university leaders can foster effective recruitment into the mentoring program by developing communication practices that promote mentoring throughout the university’s complex ecosystem. In addition, when judiciously used, rewards and incentives can foster recruitment. This section on recruitment ends by giving practical suggestions for recruiting activities for program coordinators to consider.

The program’s purpose impacts the type of mentee and mentor desired for the program. The second section of this chapter describes the positive characteristics that program coordinators should seek in mentors and mentees and the negative characteristics that coordinators should avoid in participants. In addition, the critical role of communications skills is explored in depth, highlighting the need for

mentors to have effective listening, questioning, and feedback skills. Parceling communication skills into these three areas gives program coordinators an easy-to-understand framework for explaining the characteristics they are looking for in mentors. This framework could also provide structure for training purposes.

The last section on matching helps the coordinator think through processes, such as who will do the matching and when the matching will occur. These processes need to be in the program's early design so that the required human capital is available. We encourage program coordinators to create strategies allowing mentees to have input into whom they select as mentors. This early input helps create buy-in and enthusiasm from participants and jump-starts mentorship. This chapter ends by summarizing decades of research regarding how similarities and differences factor into the matching process. From decades of research, we can draw two conclusions. First, mentees—especially underrepresented or minority groups—desire a mentor matched on surface-level attributes such as race/ethnicity or gender. Second, deep-level similarities, such as shared values, goals, interests, and attitudes, are more predictive than surface-level characteristics for forming a quality mentoring relationship and achieving the program's desired outcomes. These two conclusions will impact how program coordinators use differences and similarities to best match mentors and mentees.

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Appendix A

Faculty-to-Student Mentoring Program: Undergraduate students in the [Insert University Name here] system are being invited to participate in a new program called the [Insert University Name here] Faculty-to-Student Mentoring Program. The goals of this program are to help students:

1. Successfully adjust to university life
2. Realize they are valued members of the university
3. Have a clear sense of purpose
4. Achieve their educational goals

Faculty will provide students with the following benefits:

- **Academic Expertise.** Faculty will help you by 1) giving practical suggestions for improving your academic performance; 2) supporting your commitment to learning; 3) encouraging you to discuss and share your academic problems and brainstorm solutions; 4) helping you set realistic goals and map out strategies for achieving them; and 5) helping you think critically about your long-term aspirations and goals.
- **Career Guidance.** Faculty will assist you with your careers goals by 1) examining career options related to your field of study; 2) helping you reflect on competencies needed to achieve your goals; 3) finding the quickest route to career success; 4) helping you network with professionals in your career field; and 5) helping you set realistic career goals and map out strategies to achieve these goals.
- **Psychosocial Support.** Faculty will support you psychosocially by 1) listening to your concerns; 2) providing moral support; 3) identifying and addressing problems; 4) connecting you with support services; and 5) providing encouragement.

The total time commitment to participate in this mentoring program is between 2 and 5 hours each semester for the duration of time the student is enrolled in the program.

Website for more information: [Insert URL here]

Appendix B

Script for Mentoring Calling Campaign

*You don't need to follow this script word for word. Try to make it a comfortable, natural conversation. This script provides ideas to help with the conversation. I think there are three main points to cover:

1. Tell them a little about the program
2. Encourage them to participate
3. Direct them to the webpage

Hi, I'm (name) from [Input University name here]. Is this (student name)?

How are you doing? (Make comfortable small talk).

This semester we are continuing to offer a program called the [Input University Name here] Faculty Mentoring Program. In this program, a faculty mentor will be matched to you personally to help you achieve your academic goals and graduation. Benefits include:

- Asking questions of faculty, such as how to succeed in your academic program, what internship or research opportunities they may have, and how to connect with support services (who to see for unique situations!)
- Getting personalized advice on finding your quickest route to career success
- Getting to know our local instructors and possibly finding connections with peer groups

I want to encourage you to participate in this program, as I think it will help our students feel more connected to our faculty and campus.

Recently you were sent an email about this program, but I wanted to follow up with a personal phone call to encourage you to participate if you thought it might be helpful to you. To learn more about the program and to participate, please go to: [insert website information here]

Do you have any questions about this program that I might be able to address?

Thank you for taking the time to visit with me and thank you for attending [Input University Name here].