Department of Environmental Sciences
University of Virginia

Mentorship Agreement Overview

A mentorship agreement is a mentorship support structure used to **clarify expectations and to identify personal and shared goals** in a mentoring relationship. This mentorship agreement has been developed by a departmental committee using feedback curated through department focus groups of faculty, postdoctoral research associates, and graduate students. The focus groups identified a need and an interest in mentorship structures that was supported by all levels of the department. All members of the department that participated in focus groups agreed that effective mentoring relationships include clear communication and expectations, transparency, and a sense of safety; they also agreed that challenges of mentorship include tailoring mentorship to each student, setting boundaries, and navigating power dynamics. There was agreement that structured support can help both mentees and mentors navigate the relationship and adapt it as needed.

This is a non-binding template that should be used as a tool to support productive mentoring relationships. It should benefit both the mentor and the mentee. We encourage you to modify this template as you see fit, take notes about what confused you, and add other questions that are important to you but may be missing from the template right now. Please take the agreement you create seriously and use it to your advantage. These agreements should be revisited at least once per year. Mentees should spend at least one semester in the department before this agreement is filled out. Department members are welcome to modify the agreement for other mentoring relationships as they see fit.

If you have questions or concerns as you complete this agreement, please contact Lauren Miller (lauren.miller@virginia.edu) or the current Department Chair.

Steps to Filling Out the Mentorship Agreement

Before you meet together:

1. Complete ***Step 1*** separately the ***Mentor Agreement Questions*** and ***Mentee Agreement Questions***.
    a. These sections will also ask you to review the Department Code of Conduct and the department requirements for graduate students.
    b. This framework will maximize your time together and let you focus on what your individual thoughts are before meeting.
2. Individually review ***Step 3: Project Logistics – Optional.***
    a. Make notes on your opinions on the answers to these questions.
3. Personal Considerations
    a. Name pronunciation
        i. Create an opportunity either in the agreement or in your meeting together for your mentee(s) to write out how their name is pronounced to prevent any mispronunciations and create a resource to be referred to if necessary
        ii. Example: Kelsey O'Donnell (Kel-see Oh-don-el)
    b. Preferred Name and Pronouns
        i. Create an environment where your mentee feels comfortable sharing their preferred name and pronouns
            1. Initially introduce yourself with your own preferred pronouns
            2. Add a section to your agreement for them to write out what they prefer to be called (i.e. Preferred name/nickname: _____)
        ii. Helpful resource about pronouns
            1. HRC | Why We Ask Each Other Our Pronouns
            2. LGBTQIA Resource Center - Pronouns & Inclusive Language (ucdavis.edu)

In a meeting together:

4. Complete ***"Step 2: Shared Goals and Objectives"*** together using your Step 1 sheets.
5. Review and discuss filling out ***Step 3: Project Logistics – Optional***.
    a. Fill out pertinent sections together.
6. Combine all sections into one document, finalize your mentorship agreement, and make sure both parties have a copy.
7. Agree on a future time to revisit and review your mentorship agreement.

Detailed Instructions for Filling Out the Mentorship Agreement

Instructions for *Step 1: Individual Mentor and Mentee sections.*

1. Fill out the section thoughtfully. This is not formal and you can respond in full sentences or bullets. Important context:
    a. Question 3 (values): we suggest looking at the Appendix: Key Takeaways from the Focus Groups for ideas about what values arose during focus groups.
    b. It may be helpful to look over the full example template before filling out your section.

Instructions for *Step 2: Shared Goals and Objectives.*

1. Take a few minutes to review each other's answers.
    a. We recommend pasting your individual Step 1 sheets into a shared Google doc so you can see each other's answers.
    b. Remember that this is a living document that will change over time. You should plan to revisit it with the knowledge that your answers to the questions may change
2. Question 1 recommendation: Copy and paste your goals from the previous sections into Question 1. Sort them into shared and separate goals.
    a. It is totally fine and expected that you have separate goals. Use this as an opportunity to be explicit about what the goals of both parties are.
    b. Take a minute to discuss any goals that surprised you.
3. Question 6 recommendation: it is likely that the faculty advisor has a clearer opinion on co-authorship because they have been in the field longer. It is okay if co-authorship expectations do not align and you might use this opportunity to discuss what co-authorship means in your specific field.
4. Consider whether there are any questions you would like to add in this section.

Instructions for filling out *Step 3: Project Logistics – Optional.*

5. Step 3 is available for you to use for specific logistics planning within your mentoring relationship. It is optional, but we recommend you utilize it.
    a. Have an open conversation about which questions seemed important to both parties.
    b. Be supportive and open-minded.
    c. If you choose to fill it out, you can leave questions blank that are not useful and add questions that are useful.

Step 1: Mentor Agreement Questions

Before meeting with the mentee, the mentor should independently complete these questions. Then, in a joint meeting with the mentee, both participants will reflect on their responses as they complete Step 2. We suggest looking at the ***Appendix: Key Takeaways from the Focus Groups*** *when thinking about goals and objectives.*

Mentor name, position, and year: [print here]
Preferred name/nickname: [print here]
Preferred pronouns: [print here]
Date filled out together: [print here]
Anticipated date to re-visit: [print here]

Mentor Goals and Objectives

In this section, the mentor should define their goals for research and professional development independently and then share with the mentee at a meeting. Some goals will likely be different for each person in the mentoring relationship and discussing them will ensure both parties understand the shared vision of the relationship.

1. What are the mentor's goals (research, personal, professional, other) for the duration of the mentoring relationship?
[answer here]

2. What are the individual values you would like to bring to this mentoring relationship and how will they be presented? (e.g., open communication, maintaining respect, clear expectations, clear boundaries)
[answer here]

3. In your opinion and based on department requirements, what are your requirements for the mentee to graduate and when do you anticipate they will graduate?
[answer here]

4. In your opinion, what are the expected or anticipated outputs of this mentoring relationship before and after the mentee graduates (i.e., publications, presentations at a national conference, etc.)? What warrants co-authorship and how would you like the mentee to be involved in future presentations and publications that use their ideas and data (before and after graduation)? How will issues of co-authorship be handled?
[answer here]

5. According to department requirements, graduate students should (in general) spend up to 10 hours fulfilling their duties as a teaching assistant, up to 10 hours per week on coursework, and 20 hours per week on their research. This may change as students advance in their degree program. What is your preference for working hours and location for yourself and the mentee? How might these preferences change if either party has to conduct fieldwork or similar work?
[answer here]

6. How do you feel you can support the mentee in professional development and push them toward their ultimate career goals (e.g., attending workshops, helping them network, supporting mentorship elsewhere to give the mentee a new perspective)?
[answer here]

7. If you feel the mentoring relationship has strayed from this agreement in a way that you are not comfortable with, how would you prefer to bring it up with the mentee? Who would you prefer to talk to or have mediate if you need help keeping the mentoring relationship productive and focused on these values?
Suggested resources: Department chair, DGS, Dean of college, other committee members
[answer here]

8. Please review the Department's Mission, Vision, and Values Statement and the Departmental Code of Conduct

Step 1: Mentee Agreement Questions

Before meeting with the mentor, the mentee should independently complete these questions. Then, in a joint meeting with the mentor, both participants will reflect on their responses as they complete Step 2. We suggest looking at the ***Appendix: Key Takeaways from the Focus Groups*** *when thinking about goals and objectives.*

Mentee name, position, and year: [print here]
Preferred name/nickname: [print here]
Preferred pronouns: [print here]
Date filled out together: [print here]
Anticipated date to re-visit: [print here]

Mentee Goals and Objectives

In this section, the mentee should define their goals for research and professional development independently and then share with the mentor at a meeting. Some goals will likely be different for each person in the mentoring relationship and discussing them will ensure both parties understand the shared vision of the relationship.

1. What are the mentee's goals (research, personal, professional, other) for the duration of the mentoring relationship?
[answer here]

2. What are the individual values you would like to bring to this mentoring relationship and how will they be presented? (e.g., open communication, maintaining respect, clear expectations, clear boundaries)
[answer here]

3. In your opinion and based on department requirements, what are your requirements to graduate and when do you anticipate graduating?
[answer here]

4. In your opinion, what are the expected or anticipated outputs of this mentoring relationship before and after you graduate (i.e., publications, presentations at a national conference, etc.)? What warrants co-authorship and how would you like to be involved in future presentations and publications using your ideas and data (before and after you graduate)? How will issues of co-authorship be handled?
[answer here]

5. According to department requirements, graduate students should (in general) spend up to 10 hours fulfilling their duties as a teaching assistant, up to 10 hours per week on coursework, and 20 hours per week on their research. This may change as students advance in their degree program. What is your preference for working hours and location for research? How might these preferences change if you have to conduct fieldwork or similar work?
[answer here]

6. How do you feel your mentor can support you in professional development and push you toward your ultimate career goals (e.g., attending workshops, helping you network, seeking mentorship elsewhere for new perspective)?
[answer here]

7. If you feel the mentoring relationship has strayed from this agreement in a way that you are not comfortable with, how would you prefer to bring it up with your mentor? Who would you prefer to talk to or have mediate if you need help keeping the mentoring relationship productive and focused on these values?
Suggested resources: Department chair, DGS, Dean of college, other committee members
[answer here]

8. Please review the Department's Mission, Vision, and Values Statement and the Departmental Code of Conduct

Step 2: Shared Goals and Objectives (Mentors and Mentees)

Use your completed Step 1 sheets and fill Step 2 out together.

Mentee name, position, and year: [print here]
Mentor name, position: [print here]
Date filled out together: [print here]
Anticipated date to re-visit: [print here]

Shared Goals and Objectives

The mentor and mentee should complete this section together. These questions will encourage both individuals to reflect on how their goals and vision can be accomplished together.

1. What are our shared and separate goals? How can we help each other reach our goals?

Shared:
[answer here]

Separate:
[answer here]

2. Are there any other people or resources that the mentor or mentee can reach out to for help reaching these goals?
[answer here]

3. What are the values we share in this mentoring relationship?
[answer here]

4. How can we use these values to support a productive mentoring relationship? (e.g., to support open communication, we can have weekly meetings).
[answer here]

5. Do we agree on the expected outputs of this mentoring relationship? If not, is there a way to fulfill all of our anticipated outputs?
[answer here]

6. Are we in agreement about what warrants co-authorship? How will we handle potential future co-authorship issues?

[answer here]

7. Based on your individual answers and the mentee's status of degree, what are the hours the mentee will work and where? How will this change with fieldwork and other work?
[answer here]

8. In what ways will both the mentee and mentor work to help the mentee reach their professional development goals?
[answer here]

9. How will we communicate to refocus the goals of the mentoring partnership and who do we agree to reach out to if we need assistance mediating a conversation with each other?
[answer here]

By checking the box below, you acknowledge that you have read the Department of Environmental Sciences Mission, Vision, and Values Statement, as well as the Code of Conduct, and agree to abide by it and University of Virginia, College and Graduate School of Arts and Sciences, Department of Environmental Sciences policies and regulations.

ϒ Mentee

ϒ Mentor

Step 3: Project Logistics – Optional (Mentors and Mentees)

This section will outline the specific expectations associated with the relationship regarding working hours, modes of communication, and meeting preparation. Individuals should fill out the sections pertinent to their position separately. Together, members will discuss their responses to reach middle-ground, leaving each party with realistic expectations for the partnership. This appendix can be used to work through specific project logistics and is completely optional.

1. We agree to work together on this project for at least [#] semesters.

2. The mentor will work at least [#] hours per week on the project during the academic year.

3. The mentor and mentee will propose their weekly schedule to the mentee by [#] week prior to the start of the semester.

4. The mentee will work at least [#] hours per week on the project during the academic year, and [#] hours per week in the summer. List any additional time commitments here (e.g., TA responsibilities, course work): [answer here]

5. If a team member must deviate from this schedule (e.g. to study for an upcoming exam or for travel), then they will communicate this to their team member at least [# hours/days/weeks] before the change occurs.

6. If a team member wants to spend a prolonged period (greater than 2 weeks) away from the project (e.g. study abroad; extended travel; leave of absence), then they will communicate this intent to their team member at least [# weeks] before the change would occur. The team member requesting the change will propose a modified research schedule or plan to their teammate at least [# weeks] before the change occurs.

7. On a daily basis, our primary means of communication will be through (e.g., email, slack, carrier pigeon):
[answer here]

8. We will meet one-on-one to discuss our progress on the project and goals for at least [#] minutes [#] time(s) per month.

It will be the (mentee's mentor's) responsibility to schedule these meetings. (circle)

In preparation for these meetings, the mentee will:
[answer here]

In preparation for these meetings, the mentor will:
[answer here]

At these meetings, the mentor will provide feedback on the mentee's performance and specific suggestions for how to improve or progress to the next level of responsibility through
a. a written evaluation
b. a verbal evaluation
c. other, state below
[answer here]

9. When learning new techniques and procedures, the mentor will train the mentee using the following procedure(s) (e.g. write out directions, hands-on demonstration, verbally direct as the mentee does procedure and eventually a written protocol, etc.):
[answer here]

10. The proper procedure for maintaining data and documenting research results for this team is:
[answer here]

11. If the mentee gets stuck while working on the project (e.g. has questions or needs help with a technique, resource, or data analysis) the procedure to follow will be:
[answer here]

12. Other issues not addressed above that are important to our work together (e.g., additional information that would be beneficial for each partner to know about the other):
[answer here]

Is there anything not discussed here that you would like to add?
[answer here]

Appendix: Key Takeaways from the Focus Groups

Common ground

- Everyone (faculty, post-docs, and graduate students) agreed that there are aspects of mentoring relationships that they found challenging
    - Struggling to set boundaries was frequently mentioned: support may help in terms of setting boundaries that vary from what working hours are to how to remain professional in a relationship (ie., showing support without "being friends")
    - Mentors were concerned about executing intent: it can take longer for students to recognize that the intent of feedback is supportive and productive, even if constructive feedback can be difficult to receive in the moment
    - Because every student is different, every mentoring relationship needs to be tailored to the student, which can take time
- Between groups, there was a similar idea of what values contributed to productive mentoring relationships, such as:
    - Open communication, maintaining mutual interest/focus, maintaining respect
    - Clear expectations and structures
    - Sense of safety
- Everyone is concerned about power dynamics, but this was voiced by different groups in different ways
    - Mentees can feel unsafe setting important boundaries when they are not in power
    - Mentees can find it difficult to ask questions and advocate for themselves
    - Mentors need to know the limits of their own knowledge and when they should direct the mentee to seek out alternative mentors
    - Everyone agreed that setting expectations can be helpful for avoiding misalignment and setting work boundaries
- Everyone agreed that additional structures to support conversations and transparency would be helpful
- Everyone agreed on revising structures often
- Everyone agreed that new students in their first semester would not be prepared to fill out a mentorship agreement

Discrepancies between groups

- Faculty had more clarity on what the goals and objectives of a mentoring relationship are, and could define goals and objectives more easily than graduate students

    - Agreement that success included growth through professional development, not just products (ie. manuscripts, presentations)
- Graduate students wanted mentorship agreements for all stages of the graduate career, especially later stages. Faculty were more likely to think about this in the context of new or prospective students.
- Graduate students want oversight of some kind (department leadership or other), faculty did not want oversight
- Faculty had a preference toward agreements instead of contracts