



### Mentoring Agreement Template

Version 06\_2024. Resources adapted from Rebecca Batchelor (NCAR/UCAR GEO REU Resource Center) and Melissa McDaniels (University of Wisconsin-Madison; CIMER) in June 2024.

---

Establishing norms and setting expectations is essential for a successful mentorship relationship. A mentoring agreement provides this structure, clarity and opportunity to make assumptions explicit. Ideally, mentorship agreements should be crafted together by mentor and mentee to foster a positive and productive working relationship and open communication.

### Instructions

---

The template below is a starting place to craft a personalized mentorship agreement. Please fill in any relevant information and delete content or replace lines with any other important information that applies to your mentoring context. [Instructional lines are blue](#) in this template and should be edited or deleted in your final version. In this spreadsheet, we compiled additional [examples of mentorship agreements](#) that you can draw on to create a customized mentoring agreement for your situation.

This project is funded by the US National Science Foundation (NSF) Division of Research, Innovation, Synergies, and Education (RISE) within NSF's Directorate for Geosciences (GEO), award numbers 2307410, 2307411, 2307412, and 2307413.





## Questions Prompts: Getting to Know Your Mentor and Mentee

These question prompts can be used to guide a conversation between mentor and mentee to get to know each other and be a starting place to build the mentorship agreement. These questions are intended to facilitate conversations. Remember that people have different comfort levels around “personal” information, so as mentors, focus on subjects related to science, research and academics unless your mentee volunteers more. That said, don’t be afraid to talk about yourself as more than a scientist. If you’re comfortable sharing a little bit about yourself that makes you more “human” it helps break down the idea that scientists are somehow different from “normal people.”

### Questions to ask your mentor:

- How did you get into this field?
- What do you enjoy the most about your work?
- What do you find most challenging in your work?
- How do you spend your day?
- What do you enjoy doing outside of work?
- What do you wish someone had told you before you became a scientist?

### Questions to ask your mentee:

- What got you interested in science?
- What have been your favorite topics in college?
- What matters to you? What drives you?
- Why are you choosing to do research?
- What part of being a scientist appeals to you?
- What appeals to you as a career? What are your next steps?





## Mentoring Agreement

---

Research has shown that the most effective mentoring relationships establish clear expectations right at the beginning. This document is a tool to create a communication plan and establish clear expectations of both the mentee and the mentor. [Use the prompts below to clarify mentoring expectations with each other. Both sides could draft their responses on their own, but ideally would be finalized through a conversation.](#)

### Mentoring Agreement Questions

**As a mentor, what expectations do you have for your mentee?** ([Think about communication, effort, when to reach out for help...](#))

**As a mentee, what expectations do you have for your mentor?**

**How often and when will you meet?**





# ADVANCEing FieldSafety

Building Inclusive and Safe Field Teams

---

What platform will you use to meet? Who is responsible for scheduling the meetings?

How do you prefer to be contacted outside of these meetings? (Phone, email, chat...)

If you are having problems or are experiencing challenges in your research, what should you do?

What are milestones in your research? When should we check in about progress? (data gathering, data processing, writing; include target dates; include form of check-in on progress reporting)



[fieldsafe.colorado.edu](https://fieldsafe.colorado.edu)



# ADVANCEing FieldSafety

Building Inclusive and Safe Field Teams

What professional development, knowledge, or skills do you want to gain? (communication, work-life balance, leadership, public speaking, networking, seminars, conferences, training, etc.)

What other aspect of your research or career do you want support for? (think about careers, academia, work/life balance, see network map below for ideas...)? What are the ground rules for these discussions (e.g. confidentially, openness, truthfulness etc.)?

If problems arise, how will they be resolved?

Mentee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Mentor Signature: \_\_\_\_\_ Date: \_\_\_\_\_



[fieldsafe.colorado.edu](http://fieldsafe.colorado.edu)

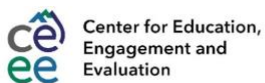


# ADVANCEing FieldSafety

Building Inclusive and Safe Field Teams



*Glessmer et al., 2015*



[fieldsafe.colorado.edu](http://fieldsafe.colorado.edu)



## Mentoring Communication Plan

This document is a tool to create a communication plan for the mentorship duration. A communication plan is usually helpful for a mentorship relationship between a student and a researcher and not usually developed for more senior mentoring relationships. Communication plans establish clear expectations for both the mentee and the mentor. Professional and respectful behavior is expected at all times, including in email and verbal communication between mentors and mentees. [Identify if a communication plan would be helpful for your mentoring context. If you develop a communication plan, the form should be discussed between mentor and mentee before finalizing.](#)

<b>Mentee Name:</b>	<b>Phone Number:</b>
<b>E-mail:</b>	
<b>Mentor Name:</b>	<b>Phone Number:</b>
<b>E-mail:</b>	
<b>Preferred Methods of Communication</b> ( <a href="#">email</a> , <a href="#">text</a> , <a href="#">video/zoom</a> , etc.):	
<b>Mentor:</b>	<b>Mentee:</b>
<b>Check-ins: How should the check-in meetings be structured?</b> (e.g. <a href="#">prioritize tasks</a> , <a href="#">technical support</a> , <a href="#">updates</a> , <a href="#">challenges</a> , <a href="#">problem-solving</a> , <a href="#">time management</a> , <a href="#">work-life balance</a> , <a href="#">career/graduate school options</a> .)	





# ADVANCEing FieldSafety

Building Inclusive and Safe Field Teams

**Frequency:** How frequently will we check in with each other and when? (e.g. daily, weekly, monthly, how long? 30 min?)

**What are the expectations around responsiveness? What can we consider a timely response?**

**Calendar:** Who will create the calendar invites?

**How should the mentee prepare for a meeting?** (create or add to agenda, include updates, discussion points, send agenda before meeting, share documents with enough lead time)

**How should the mentor prepare for a meeting?** (create or add to agenda, include updates, discussion points, send agenda before meeting)

**Assistance:** How should the mentee reach out if they need assistance?

**If one of us needs to cancel, how should it be handled?**



[fieldsafe.colorado.edu](https://fieldsafe.colorado.edu)



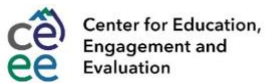


# ADVANCEing FieldSafety

Building Inclusive and Safe Field Teams

---

<b>Near-Peer Mentor/Other mentors: Who can the mentee connect with for additional support?</b> (peers, group members, colleagues, postdoc, grad student/postdoc association)	
<b>Near-Peer Name:</b>	<b>Contact:</b>
Is there a liaison or point of contact for the mentee to speak to if they have concerns?	
<b>Name:</b>	<b>Contact:</b>



[fieldsafe.colorado.edu](http://fieldsafe.colorado.edu)