Measuring Mentor-Mentee Alignment: A Toolkit
# Use of the Toolkit

This toolkit exists for the benefit of the academic community. These materials are available free of charge, nonetheless, we ask that you contact us before using the toolkit so we can provide information on usage to our funders. If you decide to use these materials, we ask that you please credit the University of Wisconsin – Institute for Clinical and Translational Research and the Wisconsin Center for the Improvement of Mentored Experiences in Research.

**Citation:** Pfund, Christine, and Spencer, Kimberly. Measuring Mentor-Mentee Alignment: A Toolkit. University of Wisconsin – Madison School of Medicine and Public Health, and Wisconsin Center for the Improvement of Mentored Experiences in Research – Madison, WI; 2020.

**Contact:** mentoring@med.wisc.edu
Background

Mentoring is defined as a professional, working alliance in which individuals work together over time to support the personal and professional growth, development, and success of the relational partners through the provision of career and psychosocial support (National Academies of Sciences, Engineering, and Medicine. 2019. The Science of Effective Mentorship in STEMM. Washington, DC: The National Academies Press. https://doi.org/10.17226/25568.). Evidence strongly supports the role effective mentorship plays in the success of biomedical researchers in training. This success translates to greater academic productivity, career satisfaction, and confidence. Despite this importance, only recently is there evidence to suggest which specific factors in mentoring relationships are critical for these positive outcomes.

One of the most critical aspects of an effective working alliance is alignment of expectations between the partners. How do we know mentors and mentees are on the same page? How do we assess alignments and address misalignment? Understanding these expectations allows for the design of measures to assess mentoring relationships, and thereby build healthier and more effective relationships.

The Measuring Mentor-Mentee Alignment Toolkit was created by Christine Pfund, PhD and Kimberly Spencer, MS, at the University of Wisconsin Madison, Institute for Clinical and Translational Research (ICTR, https://ictr.wisc.edu/education-training/), and the Center for the Improvement of Mentored Experiences in Research (CIMER, www.cimerproject.org). This toolkit is currently in use by the ICT KL2 Scholar Program as a means to assist in assessment of the mentorship relationships critical to KL2 scholar success.

Who should use this Toolkit?

The toolkit is useful for mentees and their mentorship teams seeking to gain an understanding of the perceived alignment of needs and supports across six domains of mentorship (research, career development, psychosocial, interpersonal, cultural responsiveness, sponsorship). In addition, directors of career development and training programs can use the toolkit to guide conversations among mentors and mentees to assess, align, and to optimize mentoring relationships and the outcomes resulting from those relationships.

What does the Toolkit contain?

The toolkit contains surveys for mentors and mentees developed to measure mentee needs, mentor supports, and the alignment between these two. The toolkit guides users through one potential implementation strategy and provides suggestions for assessment and interpretation of outputs from the surveys. We include surveys as Microsoft Word attachments, as well as provide a Microsoft Excel template of the Alignment Survey Results spreadsheet.
How should the Toolkit be used?

The surveys in the toolkit are intended as practical aids to assist in the development, ongoing cultivation, and continuous improvement of effective research mentoring relationships. They are meant to be modified or used as is, in whatever way best serves the goals of the mentees, mentors, and their program/organization/institution. The toolkit is most useful to facilitate and foster discussion of mentorship with the mentee and the mentorship team. We suggest asking the mentee if they are comfortable sharing the results with the mentorship team; if so, the mentee should enumerate areas they would like to focus on in the discussion to optimize alignment and support. Alternatively, mentees can use the mentee survey to assess whether their mentorship needs are being met. An example of the alignment survey response spreadsheet from the University of Wisconsin Madison is provided on page 16.

Development of this Toolkit

The Measuring Mentor-Mentee Alignment Toolkit was created by Christine Pfund, PhD and Kimberly Spencer, MS, at the University of Wisconsin Madison, Institute for Clinical and Translational Research, and the Center for the Improvement of Mentored Experiences in Research. Toolkit development was supported in part by Clinical and Translational Science Award 1UL1TR002373 from NIH/NCATS.


Acknowledgements

We acknowledge the development and implementation of the surveys and spreadsheet in this toolkit represent the combined efforts of many. This includes Stephanie House from the ICTR Mentorship team, as well as Manish Shah, Corrine Voils, Ana Garic, and Peggy Hatfield from the ICTR KL2 Scholar Program team.
Using the Toolkit

The Mentor-Mentee Alignment tool was developed initially as a set of electronic surveys administered annually by program personnel to mentees and their mentorship teams (primary research mentor, secondary mentor, career coach, etc.). Results of the surveys are interpreted using an Excel spreadsheet to facilitate a side-by-side comparison of responses from the mentee and their mentor(s). Mentees can also use the mentee survey only to assess whether their mentorship needs are being met.

The toolkit contains an example of the Mentor Roles Alignment Survey Results Spreadsheet on page 7. Program leaders/facilitators can use the results to assist mentees in determining unmet mentorship needs and evaluating the current composition of their mentorship team and their ability to meet those needs.

The surveys are divided into six domains of mentorship, with each domain presented as a separate table comprising a set of roles and behaviors. Mentees and mentors indicate a yes or no response to each role/behavior; mentees also indicate the relative importance of each role/behavior to their current career stage.

Survey Administration & Data Compilation

- Identify program personnel who will administer the surveys to the mentee and each member of the mentee’s core mentorship team. (At a minimum, this should include the mentee’s primary research mentor.) When administering surveys to multiple members within a mentorship team, program personnel should ensure that each mentor understands the identity of the mentee who is the focus of the survey.

- Program personnel enter survey results into the Mentor Roles Alignment Survey Results Excel spreadsheet template using the instructions below. The spreadsheet contains separate information fields for the Primary Mentor and a second column for responses from the Other Mentors. Personnel enter the last name of the Primary Mentor into the appropriate column in the spreadsheet; do not enter the last names of the Other Mentors. Enter responses into the second column when a mentee notes a different mentor(s) does/does not fill a role.

  - **Step 1**: Enter the importance rating for each role in the appropriate column, as indicated by the mentee in the Mentee Survey.
  - **Step 2**: Place an “X” for each role/behavior the mentee identifies the Primary Mentor or Other Mentor provide. Please note there are two columns – one column to correspond with responses for the Primary Mentor, and a second column for responses from the Other Mentors.
  - **Step 3**: Record the Primary Mentor responses in a comparable fashion, by placing an “X” in the corresponding box for Primary Mentor. If others on the mentorship team identify a role they provide, mark an “X” in the corresponding box for Other Mentors. Please note, mark only one “X” in the Other Mentors column, regardless of how many non-primary mentors indicate they provide that role.
Assessing Alignment & Interpreting Results

The tool is most useful to facilitate and foster discussion of mentorship with the mentee and the members of their mentorship team. We suggest asking the mentee if they would be comfortable with the results being shared with the mentorship team. If so, the mentee should define the areas of focus that would help optimize alignment and thereby meet their needs.

- **Step 1**: Code the alignment (by color and number) using the rubric below.
- **Step 2**: Review the alignment between mentors and mentees as indicated in the spreadsheet. It is recommended for program personnel to focus first on any needs that are deemed important by the mentee, but are not currently being met.
- **Step 3**: Schedule a meeting to share the results with the mentee and ask for reflections and interpretation of the results. Context is critical for appropriate interpretation and decision making – alignment or lack thereof in itself is not indicative of good or poor mentorship. This discussion should include any issues the mentee would like program personnel to discuss with the mentorship team during annual mentor meetings.
- **Step 4**: Discuss identified issues with the mentorship team and suggest resources available for career development of the mentee.

**Limitations**: Please note, the mentee survey included allows the mentees to identify if their primary mentor serves a particular role. Mentees may also indicate whether “another mentor” provides that role. The current version of the survey does not include a place for mentees to identify by name any specific non-primary mentor. This however could be added and mentees could indicate roles provided by specific non-primary mentors. In addition, a mentee could respond as to whether it is a role they expect their mentor to play vs. role the mentor has actually provided (i.e., mentor role to give feedback on grant may be expected, but opportunity for mentor to do so has not yet occurred.)
**Scoring Rubric Example**

Use of a color-coded scoring rubric may be used to help interpret the survey data. Data should be coded following entry of mentor and mentee survey responses entry into the Mentor Roles Alignment Survey spreadsheet. Individual organizations are free to use whatever color schema they choose. The description below is the schema in use by the UW ICTR KL2 Scholar Program.

<table>
<thead>
<tr>
<th>Mentor Responses</th>
<th>Primary Mentor Provides</th>
<th>Primary Mentor Doesn’t Provide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Mentor Provides</td>
<td>Green</td>
<td>Orange</td>
</tr>
<tr>
<td>Primary Mentor Doesn’t Provide</td>
<td>Yellow</td>
<td>Red</td>
</tr>
</tbody>
</table>

Aligned responses are coded green (both agree role is provided) or red (both agree role is not provided). Alternatively, non-aligned responses are coded orange or yellow, depending upon who believes the role is provided. Alignment, both positive (green) and negative (red) is noted by automatic placement of a “1” in the Alignment column upon entry of responses. Non-alignment (orange and yellow) is noted by placement of a “0” in the Alignment column.

We calculate percent alignment individually for both the primary mentor and the rest of the mentorship team: \[ \left( \frac{\# \text{ of positive + negative matches}}{\text{total number of matches}} \right) + \text{number of mismatches} \times 100 \], as well as the percent alignment for the entire mentorship team.

This information, plus the mentee’s indication of importance, allows program personnel to foster and facilitate review and discussion of the mentorship and resources available for career development of the mentee. Such conversations are a crucial part of the use of this tool.
## Mentor Roles Alignment Survey Results

### Spreadsheet Example

<table>
<thead>
<tr>
<th>RESEARCH</th>
<th>Primary Mentor</th>
<th>Non-Primary Mentor(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teach disciplinary knowledge</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Develop technical skills</td>
<td>1 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help learn to manage data</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Teach/Promote ethical behavior and responsible conduct of research</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Career/Professional Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help you articulate your career goals and the pathway to achieve them</td>
<td>5 Positive Match</td>
<td>56</td>
</tr>
<tr>
<td>Advance public speaking/presentation skills</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Advance your writing and professional communication skills</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you find funding</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you develop and write grant proposals</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Improve your time management skills</td>
<td>1 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you set up and manage budgets</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Teach how to hire and manage personnel</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Advance leadership skills</td>
<td>5 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Empower you to mentor others</td>
<td>5 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help manage care (clinical settings)</td>
<td>1 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Psychosocial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide motivation &amp; encouragement</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help develop coping mechanisms</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Build career self-efficacy</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Build research self-efficacy</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Act as a role model</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help build a sense of belonging (in the research team, in the dept/unit, etc.)</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Inter Personal</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify and articulate expectations for the mentee/mentor relationship</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Improve communications skills</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you collaborate effectively</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you navigate institutional culture</td>
<td>5 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Give you useful feedback</td>
<td>5 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you receive feedback</td>
<td>1 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Cultural Responsiveness/Diversity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Be culturally responsive</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you work with others from diverse backgrounds</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help you address the impact of any bias you might experience</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Help address the impact of stereotypic threat</td>
<td>2 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Connecting on a personal level</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Sponsorship</td>
<td></td>
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</tr>
<tr>
<td>Actively advocate for you</td>
<td>5 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Foster your independence</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Prepare you for promotion</td>
<td>5 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Connect you with key people/resources</td>
<td>4 Positive Match</td>
<td>28</td>
</tr>
<tr>
<td>Provide you with structured growth experiences</td>
<td>3 Positive Match</td>
<td>28</td>
</tr>
</tbody>
</table>

**KL2 Program Mentor Roles Alignment Survey Results - Mentee Name Date**

<table>
<thead>
<tr>
<th>Rating of Importance (1-5)</th>
<th>Scholar Name</th>
<th>Primary Mentor Name</th>
<th>Alignment</th>
<th>Scholar Name</th>
<th>Non-Primary Mentor(s)</th>
<th>Alignment</th>
<th>Primary Mentor</th>
<th>Non-Primary Mentor</th>
<th>All</th>
<th>Positive Match</th>
<th>Negative Match</th>
<th>Mismatch</th>
<th>% Match</th>
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</thead>
<tbody>
<tr>
<td>Teach disciplinary knowledge</td>
<td>2</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
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<tr>
<td>Develop technical skills</td>
<td>1</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
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<tr>
<td>Help learn to manage data</td>
<td>3</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<tr>
<td>Teach/Promote ethical behavior and responsible conduct of research</td>
<td>3</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<tr>
<td>Help you articulate your career goals and the pathway to achieve them</td>
<td>5</td>
<td>Pos</td>
<td>56</td>
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<td>Advance public speaking/presentation skills</td>
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<tr>
<td>Advance your writing and professional communication skills</td>
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<td>Help you find funding</td>
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<td>Improve your time management skills</td>
<td>1</td>
<td>Pos</td>
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<tr>
<td>Help you set up and manage budgets</td>
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<td>Teach how to hire and manage personnel</td>
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<tr>
<td>Help manage care (clinical settings)</td>
<td>1</td>
<td>Pos</td>
<td>28</td>
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<td>7</td>
<td>82.5%</td>
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<tr>
<td>Provide motivation &amp; encouragement</td>
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<td>Pos</td>
<td>28</td>
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<td>Help develop coping mechanisms</td>
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<td>Pos</td>
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<tr>
<td>Build career self-efficacy</td>
<td>4</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<tr>
<td>Build research self-efficacy</td>
<td>3</td>
<td>Pos</td>
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<td>7</td>
<td>82.5%</td>
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<tr>
<td>Act as a role model</td>
<td>2</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<tr>
<td>Help build a sense of belonging (in the research team, in the dept/unit, etc.)</td>
<td>4</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<tr>
<td>Identify and articulate expectations for the mentee/mentor relationship</td>
<td>3</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<td>Improve communications skills</td>
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<tr>
<td>Help you collaborate effectively</td>
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<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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</tr>
<tr>
<td>Help you navigate institutional culture</td>
<td>5</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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</tr>
<tr>
<td>Give you useful feedback</td>
<td>5</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help you receive feedback</td>
<td>1</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Be culturally responsive</td>
<td>2</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Help you work with others from diverse backgrounds</td>
<td>2</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Help you address the impact of any bias you might experience</td>
<td>2</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Help address the impact of stereotypic threat</td>
<td>2</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Connecting on a personal level</td>
<td>4</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Actively advocate for you</td>
<td>5</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foster your independence</td>
<td>4</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare you for promotion</td>
<td>5</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connect you with key people/resources</td>
<td>4</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide you with structured growth experiences</td>
<td>3</td>
<td>Pos</td>
<td>28</td>
<td>5</td>
<td>7</td>
<td>82.5%</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Mentor Survey

1. Please type your full name below

________________________________________________________________

2. Please indicate the full name of the mentee.

________________________________________________________________

3. RESEARCH

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teach them disciplinary knowledge (1)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Develop their disciplinary research skills/research design (2)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Develop their technical skills (3)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Help them learn to manage data (4)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Help them learn to use medical informatics (5)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Teach/promote ethical behavior and responsible conduct of research (6)</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

4. CAREER/PROFESSIONAL DEVELOPMENT

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help them articulate their career goals and the pathway to achieve them (1)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Advance their public speaking/presentation skills (2)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Advance their writing and professional communication skills; review their manuscripts/publications (3)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Help them find funding (4)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Help develop and write grant proposals (5)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Help improve their time management skills (6)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Help them set up and manage budgets (7)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Teach them how to hire and manage personnel (8)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Advance their leadership skills (9)</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>Empower them to mentor others (10)</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>
5. PSYCHOSOCIAL

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provide motivation and encouragement (1)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them develop coping mechanisms (2)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Build their career self-efficacy (3)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Build their research self-efficacy (4)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Act as a role model (5)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them build a sense of belonging (in the research team, in the department/ unit, etc.) (6)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

6. INTERPERSONAL

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and articulate your expectations for the relationship (1)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Improve their communication skills (2)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them collaborate effectively (3)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them navigate institutional culture (4)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Provide helpful feedback (5)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them receive feedback (6)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>

7. CULTURAL RESPONSIVENESS / DIVERSITY

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Be culturally responsive (1)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them work with others from diverse backgrounds (2)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them address the impact of any bias they might experience (3)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Help them address the impact of stereotype threat (4)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Connect with them on a personal level (5)</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
8. SPONSORSHIP

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actively advocate for them</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foster their independence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepare them for promotion</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Connect them with key people and resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provide them with structured growth experiences</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9. OTHER

<table>
<thead>
<tr>
<th>Role</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other (please specify; could be any domain)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify; could be any domain)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other (please specify; could be any domain)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. How frequently do you meet with your mentee?

- Daily (1)
- Weekly (2)
- Monthly (3)
- Other (please specify) (4)

11. How would you rate the quality of those meetings?

- Poor (1)
- Fair (2)
- Good (3)
- Excellent (4)
12. Please rate the following:

<table>
<thead>
<tr>
<th></th>
<th>Poor (1)</th>
<th>Fair (2)</th>
<th>Good (3)</th>
<th>Excellent (4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>My working relationship with this scholar (1)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>The scholar’s working relationship with research group members (2)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>The amount of time the scholar spent doing meaningful research (3)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>The amount of time I spend with this scholar (4)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
<tr>
<td>The career advice I give this scholar (5)</td>
<td>○</td>
<td>○</td>
<td>○</td>
<td>○</td>
</tr>
</tbody>
</table>

13. Please rate the following:

<table>
<thead>
<tr>
<th></th>
<th>Very Low (1)</th>
<th>Average (4)</th>
<th>Very High (7)</th>
</tr>
</thead>
<tbody>
<tr>
<td>How would you rate the overall quality of your mentoring? (1)</td>
<td>○</td>
<td>(3)</td>
<td>(6)</td>
</tr>
<tr>
<td>To what extent do you feel you are meeting your mentee’s expectations? (2)</td>
<td>○</td>
<td>(3)</td>
<td>(6)</td>
</tr>
<tr>
<td>How confident are you in your mentoring skills? (3)</td>
<td>○</td>
<td>(3)</td>
<td>(6)</td>
</tr>
</tbody>
</table>
## Mentee Survey

1. Please type your full name below

---

2. **RESEARCH**

<table>
<thead>
<tr>
<th>Is your primary mentor providing this role?</th>
<th>Is a different mentor providing this role?</th>
<th>How important is it for a mentor to provide this role?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes (1)</td>
<td>No (2)</td>
<td>1 = Not At All Important, 3 = Moderately Important, 5 = Extremely Important</td>
</tr>
<tr>
<td>Teach you disciplinary knowledge (1)</td>
<td></td>
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<tr>
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3. **CAREER/PROFESSIONAL DEVELOPMENT**

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<tr>
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<tr>
<td>Help you find funding (4)</td>
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</tr>
</tbody>
</table>
Help you develop and write grant proposals (5)

Improve your time management skills (6)

Help you set up and manage budgets (7)

Teach you how to hire and manage personnel (8)

Advance your leadership skills (9)

Empower you to mentor others (10)

Help you manage care (clinical settings) (11)

<table>
<thead>
<tr>
<th>4. PSYCHOSOCIAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Is your primary mentor providing this role?</td>
</tr>
<tr>
<td>Yes (1)</td>
</tr>
<tr>
<td>Provide you with motivation &amp; encouragement (1)</td>
</tr>
<tr>
<td>Help you develop coping mechanisms (2)</td>
</tr>
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<td>Build your career self-efficacy (3)</td>
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<tr>
<td>Build your research self-efficacy (4)</td>
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<td>Act as a role model (5)</td>
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<td>Help you build your sense of belonging (in the research team, in the department/unit, etc.) (6)</td>
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1 = Not At All Important, 3 = Moderately Important, 5 = Extremely Important
5. INTERPERSONAL

<table>
<thead>
<tr>
<th>Role</th>
<th>Is your primary mentor providing this role?</th>
<th>Is a different mentor providing this role?</th>
<th>How important is it for a mentor to provide this role?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and articulate expectations for the mentee/mentor relationship</td>
<td>Yes (1) No (2)</td>
<td>Yes (1) No (2)</td>
<td>1 = Not At All Important, 3 = Moderately Important, 5 = Extremely Important</td>
</tr>
<tr>
<td>Improve your communication skills (2)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Help you collaborate effectively (3)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Help you navigate institutional culture (4)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Give you useful feedback (5)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Help you receive feedback (6)</td>
<td>o</td>
<td>o</td>
<td>o</td>
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</tbody>
</table>

6. CULTURAL RESPONSIVENESS / DIVERSITY

<table>
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<tr>
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<th>How important is it for a mentor to provide this role?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Being culturally responsive to you (1)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Help you work with others from diverse backgrounds (2)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Help you address the impact of any bias you might experience (3)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Help you address the impact of stereotypic threat (4)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Connect with you on a personal level (5)</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>
7. SPONSORSHIP

<table>
<thead>
<tr>
<th>Role</th>
<th>Primary Mentor</th>
<th>Different Mentor</th>
<th>Importance of Providing This Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actively advocating for you (1)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
<tr>
<td>Foster your independence (2)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
<tr>
<td>Prepare you for promotion (3)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
<tr>
<td>Network/connect you with key people and resources (4)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
<tr>
<td>Provide you with structured growth experiences (5)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
</tbody>
</table>

8. OTHER

<table>
<thead>
<tr>
<th>Role</th>
<th>Primary Mentor</th>
<th>Different Mentor</th>
<th>Importance of Providing This Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other (please specify; could be any domain) (1)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
<tr>
<td>Other (please specify; could be any domain) (2)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
<tr>
<td>Other (please specify; could be any domain) (3)</td>
<td>Yes (1)</td>
<td>No (2)</td>
<td>Yes (1)</td>
</tr>
</tbody>
</table>

9. What is your satisfaction with the overall quality of your mentoring relationship?
   - Very Dissatisfied (1)
   - Dissatisfied (2)
   - Neither Satisfied nor Dissatisfied (3)
   - Satisfied (4)
   - Very Satisfied (5)
10. How frequently do you meet with your primary mentor?
   o Daily (1)
   o Weekly (2)
   o Monthly (3)
   o Other (Please note) (4) ____________________________

11. How would you rate the quality of those meetings?
   o Poor (1)
   o Fair (2)
   o Good (3)
   o Excellent (4)