



MENTOR

Checklist

ELEMENTS OF EFFECTIVE PRACTICE FOR MENTORING™

5TH EDITION | 2025

This checklist version of key practices detailed in the 5th Edition of the *Elements of Effective Practice for Mentoring* can help programs assess how they are doing their work and identify areas for improvement or innovation. Readers are encouraged to read the full publication for additional details and implementation tips related to each of these practices. Click below to jump to element.

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ELEMENT 1:

PROGRAM VALUES

Standard of Practice: All mentoring programs should consider the values, principles, and ethics that inform their program design and delivery, and codify them into the program's mission statement and a formal values statement, as well as in program policy.

- ☐ **The program crafts a values statement that describes the core values, principles, and ethical viewpoints informing the program's design and delivery. These values may include:**
 - o An ethical standard of "do no harm"
 - o A commitment to inclusive practices that recognize the diverse identities of young people and facilitate their sense of belonging
 - o Honoring youth voice and agency
 - o Honoring the voices of caregivers and the broader community
 - o Adopting a strengths-based view of young people
 - o Establishing, and not exceeding, indicators of program capacity and a maximum number of youth served
 - o Embracing a continuous improvement mindset



ELEMENT 2:

STRONG PROGRAM DESIGN

Standard of Practice: All mentoring programs should design their services based on careful consideration of youth strengths needs, available resources, and a theory of change that describes how the program's mentoring experiences can help youth achieve meaningful progress on relevant outcomes. This program design should be codified through written documents that include a mission statement, a vision statement, a logic model and theory of change, and a policy and procedures manual.

- ☐ **The program has written mission and vision statements that detail the purpose of the program and its vision for participating young people and, as relevant, the broader community.**
- ☐ **The program has a logic model that broadly illustrates how program resources, activities, and inputs lead to key outputs that are connected to meaningful short-, medium-, and long-term outcomes for participating youth and, as relevant, the community.**
- ☐ **The program has a theory of change that describes in detail how a youth's program experiences are designed to lead them toward the outcomes prioritized by the program.**
- ☐ **The program has a written policy and procedures manual that clearly articulates program rules and official policies, as well as the procedures that implement those policies in day-to-day operations.**
- ☐ **The program reviews and updates program design materials on a regular basis to ensure that continuous improvement is possible.**





ELEMENT 3:

RECRUITMENT OF YOUTH PARTICIPANTS

Standard of Practice: Program recruits an appropriate number of eligible youth by implementing a formal recruitment plan.

- ☐ The program has a written recruitment plan with multiple strategies for recruiting mentees.
- ☐ The program uses recruitment messages that realistically portray program expectations, benefits to youth (and caregivers when appropriate), and the supports youth and mentors will receive throughout program participation.
- ☐ The program has publicly available eligibility criteria and participation requirements for youth.
- ☐ Recruitment messages take a strengths-based approach, represent the full diversity of the community being served, and ensure that eligible individuals from all walks of life feel welcomed and accepted in the program.



ELEMENT 4:

RECRUITMENT OF MENTORS

Standard of Practice: Program recruits a diverse pool of appropriate mentors (either volunteers or paid staff mentors), in sufficient numbers, by implementing a formal recruitment plan.

- ☐ The program has a written recruitment plan with multiple strategies for attracting mentors.
- ☐ The program uses recruitment messages that realistically portray the mentoring experience, the program's expectations, benefits to youth and mentors, and the supports mentors receive.
- ☐ The program recruits mentors whose skills, values, motivations, and backgrounds best match the program's services and goals, as well as the characteristics and needs of the youth being served.
- ☐ The program has publicly available eligibility criteria and requirements for mentors.
- ☐ Recruitment messages and materials represent the full diversity of the community being served and ensure that eligible individuals from all walks of life feel welcomed and accepted in the program.





ELEMENT 5:

YOUTH ENROLLMENT

Standard of Practice: Programs should have processes for welcoming youth into the program that ensure prospective participants are eligible and a good fit in terms of their goals and commitment to engage in the mentoring relationship and program activities.

- ☐ The program has established policies and procedures for confirming youth eligibility and their compatibility with, and interest in, the services offered, and for accepting or not accepting them into the program.
- ☐ The program provides youth (and caregivers, as needed) with a formal application that is completed as part of the enrollment process.
- ☐ Youth (and their caregivers, as needed) formally consent to participate in the program and commit to following program expectations and rules upon their acceptance into the program.



ELEMENT 6:

MENTOR SCREENING AND ENROLLMENT

Standard of Practice: Programs should implement a mentor screening and enrollment process that determines all mentors are both safe and suitable for the program experience prior to being formally accepted and placed in a mentoring role.

- ☐ The program has written policies and procedures for assessing the safety and suitability of prospective mentors, and for accepting or not accepting them into the program.
- ☐ The program provides prospective mentors with a formal application that is completed as part of the enrollment process.
- ☐ The program conducts an in-person or online face-to-face interview with prospective mentors using a standardized protocol.
- ☐ The program conducts a criminal history records check, as well as checks of other records that may be relevant for identifying safety concerns and determining the eligibility of a mentor.
- ☐ The program conducts reference checks with at least two references provided by the prospective mentor using a standardized protocol.
- ☐ Prospective mentors formally commit to participating in the program and commit to following program expectations and rules upon their acceptance into the program.





ELEMENT 7:

YOUTH (AND CAREGIVER) PREPARATION AND TRAINING

Standard of Practice: The mentoring program offers youth (and their caregivers, as relevant) a robust preparation experience, typically centered around a mandatory orientation or training prior to starting mentoring relationships that builds their skills and knowledge for participating effectively in the program, as well as offering ongoing training throughout their relationship.

- ☐ **The program requires all youth participants to attend a pre-match orientation, training or “preparation” event that sufficiently prepares them for their role as a mentee prior to meeting with a mentor.**

Program-related topics

- o Program values, beliefs, and ethical principles (see Element 1).
- o Program requirements, rules, and expectations for participation.
- o Participating in program activities and using program materials (e.g., use of a standardized curriculum or completing specific tasks using program materials).
- o Seeking help with the mentoring relationship, the role of program staff in supporting their experience, and the youth’s responsibility for participating in check-ins with program staff.

Mentoring relationship topics

- o Description of the typical range of mentoring activities and experiences.
- o Tips for initiating and maintaining mentoring relationships.
- o Setting realistic expectations for their relationship with the mentor, including information about the types of support mentors are (and are not) expected to provide and how they can maximize that support.
- o Staying safe in the relationship and information around mandatory reporting of suspected abuse.
- o Program processes for transitioning out of a mentoring relationship.

Training delivery

- o Training lasts a minimum of one hour, or as long as required to sufficiently cover all the information the program has deemed relevant for youth to know before they begin their mentoring relationship.
- o Training is delivered in person, ideally, or virtually (live, instructor-led) using technology (e.g., web-conferencing software).
- o Training includes role-plays, mentoring scenarios, or other opportunities for youth to apply newly learned concepts or skills.
- o Training information is presented in multiple formats (e.g., verbally, in print, using infographics) to appeal to as wide a variety of learning styles as possible.
- o Training information is accessible for youth with disabilities.
- o The training is evaluated for effectiveness and areas of improvement by soliciting feedback from participating youth.



ELEMENT 7: CONT.

- ☐ The program offers ongoing training to youth on topics relevant to the program model and to common challenges in mentoring relationships.
- ☐ When relevant, the program orients caregivers (or other important adults) to the program's rules, expectations for their and the youth's participation, and ways they can support the mentoring relationship.



ELEMENT 8:

MENTOR PREPARATION AND TRAINING

Standard of Practice: The mentoring program offers robust preparation for mentors — most often in the form of a mandatory multi-hour training event — prior to any mentor beginning work with a young person, with additional training offered over the course of their relationship. This training should provide mentors with information critical to their success in the role while also building their confidence for the experience and a sense of collaboration with staff around fulfilling their role.

- ☐ The program requires a multi-hour pre-match training that prepares mentors for their role prior to beginning any work with youth.

Program-related topics

- o Program values, beliefs, and ethical principles (see Element 1).
- o The program's theory of change, including intended program outcomes and the relationship processes contributing to those outcomes (Element 2).
- o Program requirements, rules, and expectations for participation (e.g., the expected frequency and duration of mentoring interactions, rules for mentor and youth behavior, relevant policies and procedures, check-ins with staff and reporting on mentoring activities, etc.).
- o Engaging in program activities and using program materials (e.g., use of an activity curriculum or completing specific tasks using program materials).
- o Information about the youth the program serves, their caregivers and families, and their community context, as relevant to the work mentors will engage in.
- o Youth safety, red flags, and mandatory reporting of suspected abuse.
- o Seeking help with the mentoring relationship, the role of program staff in supporting their experience, and the mentor's responsibility for participating in relationship check-ins.



ELEMENT 8: CONT.

Mentoring relationship topics

- o Description of the mentor role and the typical range of mentoring activities and experiences.
- o Setting realistic expectations for their relationship with youth.
- o Common challenges in mentoring relationships and how to establish appropriate mentor roles and boundaries.
- o How to initiate, maintain, and transition out of mentoring relationships including the critical importance of positive closure experiences.
- o Working effectively with caregivers and other adults in the youth's life.
- o Improving mentors' cultural responsiveness and inclusiveness.
- o Key mentoring skills, such as active listening, expressing empathy, growing social capital, advocacy, supporting youth goal setting and pursuit, or other relevant forms of mentor support.

Training delivery

- o Training lasts a minimum of two hours or as long as needed to sufficiently cover all the information the program has deemed necessary for mentors to know before they start mentoring.
- o Training is delivered in person or using a blended learning approach (i.e., in person and online).
- o Training information is presented in multiple formats (e.g., verbally, in print, using infographics) to appeal to a wide variety of learning styles.
- o Training information is accessible for mentors with disabilities.
- o Training includes role-plays, mentoring scenarios, or other opportunities for mentors to practice and apply newly learned concepts or skills.
- o Training includes learning checks and an assessment of mentor knowledge or skills to gauge the effectiveness of the training and help improve it over time.
- o The training is evaluated for effectiveness and areas of improvement by soliciting feedback from participating mentors.

- ☐ **The program uses training as an additional opportunity to assess prospective mentors' suitability for participating in the program, screening out mentors who do not seem capable of adhering to the program's behavioral expectations or values.**
- ☐ **The program requires ongoing training for mentors on topics relevant to the program model or to address common challenges in mentoring relationships.**





ELEMENT 9:

ESTABLISHING MENTORING RELATIONSHIPS

Standard of Practice: Mentoring programs create new mentoring relationships, whether between individuals or between mentors and groups of youth, using a standardized procedure and set criteria that increase the likelihood of a successful mentoring experience for participants.

- ☐ **The program has established criteria and a process for determining the compatibility and potential “fit” between youth participants and mentors. Criteria may include:**
 - o Shared backgrounds, identities, or lived experience(s);
 - o Shared interests or hobbies;
 - o Compatibility of preferred meeting times and locations;
 - o Compatible values, personality traits, and communication styles; and
 - o Mentor characteristics that could support the youth’s pursuit of their specific goals or developmental needs (i.e., skills or professional experiences that are aligned with the youth’s goals or needs).

- ☐ **The program matches youth with mentors using a standardized procedure that includes:**
 - o Sharing information with all participants about their potential mentoring “match” prior to their first mentoring interaction.
 - o Consideration of participant preference and feedback before moving forward with a proposed mentoring match.
 - o Arrangement and facilitation of an initial meeting between mentor and youth in which mentoring roles, participant expectations, and program values are reiterated.
 - o Having all participants (including caregivers where relevant) sign a match commitment form or similar document that details expectations around the frequency and duration of mentoring activities, areas of focus for the relationship (e.g., goals), how the participants will communicate between mentoring activities, and other details that help clarify expectations for each participant around the mentoring experience.





ELEMENT 10:

ONGOING CAREGIVER ENGAGEMENT

Standard of Practice: Programs should implement, as relevant to the population served and program model, several strategies for meaningfully engaging caregivers (or others who are directly supporting the mentoring relationship) in program activities and in the mentoring experience of the youth.

- ☐ The program has a written caregiver engagement plan that outlines how it will engage and support parents, guardians, and others in creating and fostering the mentoring relationship.
- ☐ The program provides information to caregivers throughout the mentoring relationship detailing the youth's achievements in the program, changes in program policies or procedures, upcoming program activities, and tips for how they can support the mentoring relationship.
- ☐ The program involves caregivers in special program activities and events to foster engagement and enthusiasm for the youth's mentoring experience.



ELEMENT 11:

SUPPORTING MENTORING RELATIONSHIPS

Standard of Practice: Programs should require ongoing, consistent check-ins and support opportunities to mentoring participants to minimize risk and maximize the positive impact of the mentoring relationships.

- ☐ The program checks in with participating mentors and youth (ideally with the same staff member supporting both) on key topics at an established and regular frequency to foster high-quality mentoring and program participant relationships.

Topics for check-ins:

- o Assess whether their expectations for program participation are being met.
- o Celebrate milestones.
- o Monitor for risk management concerns.
- o Note relationship growth and progress toward goals.
- o Address challenges as they arise.
- o Inquire about changes in participants' life circumstances.
- o Gather data relevant to program reporting and evaluation efforts, including feedback on program practices.
- o Share appreciation for their participation.

Recommended frequency of check-ins:

- o Quick check-ins at least once a month, with each relationship participant, for the first year.
- o In-depth support meetings every month for the first quarter of the relationship and then at least once a quarter for the rest of the program year/cycle.



ELEMENT 11: CONT.

- ☐ The program checks in with the caregivers of youth participants (ideally with the same staff member supporting the mentor and youth) at an established and regular frequency covering the same topics included in mentor and youth check ins.
- ☐ The program uses a standardized protocol for each in-depth check-in so that consistent information is gathered and appropriate support is offered to every participant.
- ☐ The program documents each check-in with participants, including the information gathered and support given at each instance.
- ☐ The program has a policy governing the frequency of participant check-ins and how to bridge support during staff transitions, as well as a process for tracking the quality and consistency with which staff complete these tasks.
- ☐ The program uses the information gathered during participant check-ins to assess the quality of the mentoring relationship at least twice a year and determine whether it is healthy and active or should be considered for a planned ending.



ELEMENT 12:

RELATIONSHIP CELEBRATION AND PROGRAM EXIT

Standard of Practice: Programs should facilitate a relationship celebration and program exit process that ends the mentoring experience on a positive note and provides an opportunity for participants to express gratitude, share feedback, and process the experience of being part of the program.

- ☐ The program has written policies and procedures for addressing various mentoring relationship closure scenarios, including, but not limited to, closures that are the result of typical program cycles (e.g., end of the school year) and those that result from unexpected circumstances (e.g., mentor or youth move away, instances of inappropriate behavior by a participant, a mentor or child being unreachable).
- ☐ Regardless of why a mentoring relationship is ending, the program should prepare participants for the closure of their relationship and facilitate a series of closure activities, including, but not limited to:
 - o Coaching participants on how to properly celebrate their relationship and say goodbye.
 - o Arranging a final meeting between mentors and youth.
 - o Offering each participant an opportunity to debrief the mentoring experience with program staff.
 - o Getting written confirmation that participants agree to follow the program's policies and rules around post-participation contact.
 - o Offering referrals to other services and supports that may be helpful, including referrals to other mentoring programs.



ELEMENT 12: CONT.

- ☐ The program has criteria for determining, and a process for assigning, new relationships to youth and mentors who are still eligible after their initial mentoring relationship has ended.
- ☐ The program holds a celebration event in each program cycle to celebrate the relationships and achievements of program participants.



ELEMENT 13:

PROGRAM LEADERSHIP AND STAFFING

Standard of Practice: The program has adequate leadership and staffing to implement services with fidelity to the program model and ensures that all staff have relevant experience, knowledge, and professional development needed to implement essential functions of their roles, and that they reflect the full diversity of the community being served.

- ☐ The program has a board of directors or advisory committee that provides adequate governance, decision-making, oversight, and resource development support to the program.
- ☐ The program should be adequately staffed by individuals with relevant backgrounds and education to implement key functions of the program.
- ☐ The program's staffing reflects the diversity of the community being served, with strategies in place to recruit and retain such individuals over time.
- ☐ The program has policies and procedures in place to address discrimination based on race, color, religion, gender identity, sexuality, national origin, disability, and/or age.
- ☐ The program supports all staff members by providing adequate compensation, job-specific onboarding and training, meaningful supervision and support, and opportunities for ongoing professional development and recognition outlined in a formal staff development plan.





ELEMENT 14:

COMMUNITY ENGAGEMENT

Standard of Practice: Programs should forge meaningful community partnerships and participate in other engagements to inform key program development and implementation activities and ensure the program is embedded in the historical and social context of the community and the individuals they serve.

- ☐ The program engages with other mentoring organizations, youth-serving programs, and service providers, and establishes formal partnerships as needed.
- ☐ The program implements strategies to learn about the community it serves and incorporate its history and lived experience into its organizational values and programmatic decision-making.
- ☐ The program engages in activities that promote mentoring in the public and private sectors and builds long-term community awareness and interest in supporting young people.



ELEMENT 15:

PROGRAM INFRASTRUCTURE AND SUSTAINABILITY

Standard of Practice: To ensure sustainable service delivery and organizational health, programs should employ multiple management policies and practices, including, but not limited to, resource development and financial management, marketing and communications, information management, and liability insurance.

Resource Development and Financial Management

- ☐ The program has a detailed annual program budget and formal accounting system.
- ☐ The program has a resource development plan that details how operating funds will be sourced and maintained over time.

Marketing and Communications

- ☐ The program has a communications and marketing plan that educates and engages the community and potential participants about its work.
- ☐ Communication materials accurately portray the population of youth served and their communities using strengths-based language.



ELEMENT 15: CONT.

Information Management

- ☐ The program has written policies and procedures for storing and managing participant information and records, as well as other key program information, such as staff files, financial reports, and proprietary documents.
- ☐ The program has a database or other software for compiling and managing information about program participants, their mentoring relationships, and their program experience.

Liability Insurance

- ☐ The program has active liability insurance coverage that is aligned with the activities of the program and its staff and the nature of mentor-youth activities.



ELEMENT 16:

PROGRAM EVALUATION

Standard of Practice: The mentoring program creates and implements a formal evaluation and data collection plan that addresses tracking of implementation fidelity, mentoring relationship quality, relevant participant outcomes, and program costs.

- ☐ The program has a written evaluation plan.
- ☐ The program engages in consistent, ongoing data collection and analysis to address the questions outlined in its evaluation plan.
- ☐ The program shares evaluation findings with stakeholders.
- ☐ The program uses findings to make improvements in its services on a regular basis.





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Checklist adapted from:

Herrera, C., Garringer, M., & Bennett, R. (2025). *Elements of effective practice for mentoring*, 5th Edition. Boston, MA: MENTOR.