

Duke-UNICEF Mentorship Program Goal Setting Worksheet



This form is designed to be used by the mentor and mentee to document decisions and plans together about the work ahead. As conditions change and your relationship matures, refer to this sheet to be reminded of agreements you made early on.

In advance of your first meeting, think about the themes below. When you meet, use the form as the basis for conversation and decision-making.

Clarify Roles

1. The role of a mentor is to share expertise, advise, advocate, coach, and support. The role of the mentee is to seek advice and take steps toward professional growth.

Write comments or clarifications you wish to make about your roles.

Considerations—what are your strengths? In what areas do you feel most prepared to offer advice? Are there any schedule/time constraints?



Establish Purpose

2. Mentoring for its own sake is not your purpose! Your shared purpose is to assist the mentee in finding success in their work and to advance their impact.

Record your specific purposes for entering this mentoring partnership.

Consider both overarching goals and specific goals.



Document Initial Goals

3. For the mentee: What do you wish to accomplish? In your meeting, discuss goals and set priorities. You will continue setting goals as you meet in the weeks ahead.

Record several short-term work goals and long-term career goals.

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Establish Mentoring Timeframe

4. How long should your mentoring relationship last? Having a clear end point will make you more productive in your time together. Consider a target date six to twelve months ahead. Let major milestones guide your choice, such as a performance appraisal or a project review. Plan a mid-point check halfway to your goal to reflect on progress.

Describe your timeframe here. Set your midpoint check-in meeting now.

Put reminders on your calendar! Schedule in advance!

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Plan Your Work Together - Regular Meetings

5. Decide when, where and how frequently you will meet. Agree to maintain momentum by keeping to your meeting schedule, but discuss what you will do if one of you needs to postpone a meeting.

Record your regular meeting plan and contingency plan.

While mentees should be proactive, the mentor should check in periodically, especially if it has been a while since you've met.

Plan Your Work Together - Informal interactions

6. Mentoring works best when the participants can interact in an "open door" environment, but set some ground rules. Are impromptu drop-in meetings acceptable to the mentor? What kind of turn-around can each of you expect when the other leaves a message by phone or e-mail?

Briefly note each of your preferences and expectations.

Discuss Constructive Feedback

7. In a healthy partnership, both parties are able to give and take constructive feedback. A mentor may give critical input to help a mentee learn a new skill, change methods, or build awareness. In turn, a mentee may counter a recommendation or ask for a different kind of support from the mentor.

Discuss how you each prefer to give and receive critical feedback. And how will you agree to disagree?

Establish Meeting Agenda

8. Review the Meeting Plan Template together. It is designed to help you structure effective meetings and document activity that occurs between meetings.

Discuss ways to adapt or extend the Meeting Plan Template, and then customize it for your purposes. What is the topline agenda?

Mentees should send an agenda in advance of meeting.

Prepare for your next meeting using the Meeting Plan Template

9. Set goals for your next meeting!

Record contact information for each of you

10. Clarify your preferred method of communication!

Name:		
Phone(s):		
email:		

Once worksheet is completed, review with each other and keep for your records.