



Worksheet for Planning the Mentoring Relationship

Date:	
Mentor:	Mentee:

When entering into a mentoring partnership both parties agree to a shared commitment and effort. This worksheet can be completed together at your first meeting and it helps to document decisions you jointly make about the work ahead. It is an important tool to keep you both on track throughout the mentorship period.

Refer to this sheet at each meeting to be reminded of agreements you made at this first meeting, use it as the basis for decision-making and as needed adjust your plan as you proceed.

1. Clarify roles

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

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

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2. Establish purpose

Mentoring for its own sake is not the purpose of this program. This program seeks to empower the next generation of union activists and contribute to renewal.

Record your specific purposes for entering this mentoring partnership (for example, to learn from one another about a particular topic or to develop new defined skills, such as running meetings or negotiating contracts).

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3. Document initial goals

What do you wish to accomplish by working together in the mentoring relationship?

Discuss and record your short-term and long-term work goals. You will likely continue refining these goals and setting new ones as you meet in the weeks ahead.

4. Establish mentoring timeframe

How long should your mentoring relationship last? Having a clear endpoint can make you more productive in your time together and help you stick to a schedule. Consider a target date of six to twelve months ahead. Plan a mid-point meeting to reflect on progress halfway to your goal.

Describe your timeframe here. Set your mid-point check-in date.

5. Plan your work together

Record 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.

Discuss and record your regular meeting plan as well as your contingency plan.

6. Plan your work together

Mentoring works best when the participants can interact as needed, but it is important to set some ground rules. Are unscheduled drop-in meetings acceptable? What kind of response time can each of you expect when the other leaves a message by phone or e-mail?

Briefly note your preferences and expectations.

7. Discuss how to give and receive constructive feedback

In a healthy mentoring 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, improve methods, or build awareness. In turn, a mentee may offer a recommendation or ask for a different kind of, or more support from the mentor.

Discuss and record how you prefer to give and receive critical feedback. How will you ensure the feedback and partnership remains respectful and productive for both of you?

8. Determine your next meeting date and time