

# Mentoring Relationship

## Planning Template

When entering into a mentoring partnership both parties commit to a shared effort. This form is designed to document decisions you make 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.

**1. Clarify Roles.** The role of a mentor is to share expertise, advise, advocate, coach, and support. The role of the mentee is to set goals, seek advice, and take steps toward professional growth. *Write comments or clarifications you wish to make about your roles.*

**2. Establish Purpose.** Mentoring for its own sake is not a purpose. *Record your specific purposes for entering this mentoring partnership.*

**3. Document Initial Goals.** For the mentee, what do you wish to accomplish? Record several short-term work goals and long-term career goals. *In your initial meeting, discuss goals and set priorities. You will continue setting goals as you meet.*

**4. Establish Mentoring Timeframe.** 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 review or a product release. Plan a mid-point check halfway to your goal to reflect on progress. *Describe your timeframe here.*

**5. Meeting Plan.** What you will do if one of you needs to postpone a meeting?  
*Record your regular meeting plan and contingency plan.*

**6. Plan Your Work Together - Informal interactions.** This fully remote mentoring arrangement is unique and can make informal interaction more difficult. What ad hoc calls or meetings are acceptable? What kind of turn-around can each of you expect when the other leaves a message by phone or e-mail? *Briefly note your preferences and expectations.*

**7. Discuss Constructive Feedback.** In a healthy partnership, both parties can give and take constructive feedback. A mentor may give critical input to help a mentor learn a new skill, change methods, or build awareness. In turn, a mentor may counter a recommendation or ask for a different kind of support from the mentor. *Discuss how you prefer to give and receive critical feedback. And how will you agree to disagree?*