

## Goal Setting Worksheet

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.

*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.*

- 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 and take steps toward professional growth.

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

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

*Considerations for protégé/mentee—are you prepared to be proactive? How often do you plan to meet with your mentor? Do you understand your line management structure?*

- 2. Establish Purpose.** Mentoring for its own sake is not your purpose! Your shared purpose is to assist the mentee in finding success in his or her job and to advance his or her career.

*Record your specific purposes for entering this mentoring partnership.*

*Consider both overarching goals and specific goals.*

*For example, a postdoc needs to conduct productive research and prepare for next career step. What are some steps to get from postdoc to faculty or research staff?*

*A new staff member may need to know how to build a strong case for promotion from RD2-RD3. What does a typical strong case for promotion look like in your division?*

*A new professional/administrative staff member may benefit from growing a network at the lab and learning about the needs of the programs he/she supports.*

- 3. Document Initial Goals.** 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.*

*This is where the protégé will want to consider:*

- Immediate needs—e.g. new to the lab; prepping for a conference; preparing for job search (postdocs and grad students)*
- Long-term goals—e.g. career goals; leading own research group; taking on management responsibilities*

- 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 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!*

**5. Plan Your Work Together - Regular Meetings.** 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 protégés/mentees should be proactive, the mentor should check in periodically, especially if it has been a while since you've met.*

**6. Plan Your Work Together - Informal interactions.** Mentoring works best when the participants can interact in an "open door" environment, but set some ground rules. Are impromptu drop-in meetings 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.*

*Be creative—meet for lunch or coffee; attend a seminar or workshop together; go to a social event, volunteer to do outreach together, etc.*

**7. Discuss Constructive Feedback.** 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 prefer to give and receive critical feedback. And how will you agree to disagree?*

*Seek advice from peers or mentoring leaders at the lab if you feel you have reached an impasse. Don't let one disagreement completely derail the mentoring relationship.*

**8. Establish Meeting Agenda.** 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.*

**9. Prepare for your next meeting using the *Meeting Plan Template*.**

**10. Record contact information for each of you.**

Name:		
Phone(s):		
email:		

*Make a copy of this page for each of you.*