

Mentoring Goal Assessment



As the end of the timeline set out in the strategic agreement nears, it is important to schedule a mentor meeting to discuss progress and assess the relationship. Some mentors and mentees may decide to continue their relationship in a formal or informal capacity and extend their initial agreement. Others may decide that they have accomplished their intended outcomes and do not need to continue a formal relationship. Regardless of what decision you make, reviewing the relationship is important to evaluate progress and help shape future mentoring relationships.

Suggested Timeline

Use this form during the final scheduled mentor meeting to determine next steps. (Mentor and Mentee should retain a copy of this form).

Review the goals you set in the strategic agreement, for each goal answer the following questions:

Was the goal achieved?	
<input type="checkbox"/> Yes	What helped you to achieve the goal?
	Is there a follow-up goal to continue progressing in this area of your professional and/or personal development?
<input type="checkbox"/> No	What challenges did you face?
	Do you want to continue working toward this goal?
	What resources do you need to continue working toward this goal?
	Do you need to update the goal or timeline? <input type="checkbox"/> Yes <input type="checkbox"/> No

Mentoring Achievements. Review the desired outcomes for mentor and mentee that were established in the strategic agreement form in step two.

Is the mentee where they hoped to be at this time? *If yes, what went well and what helped you get here. If no, what progress did you make, and what do you need to continue moving toward your desired outcome.*

What skills did the mentee display that made them an effective mentee? This is a good place to discuss successes of the mentoring relationship.

Are there particular skills the mentee could work to improve that would make them an even more effective mentee in the future?

Is the mentor where they hoped to be at this time? *If yes, what went well and what helped you get here. If no, what progress did you make, and what do you need to continue moving toward your desired outcome.*

What skills did the mentor display that made them an effective mentor?

Are there particular skills the mentor could work to improve that would make them an even more effective mentor in the future?

Next Steps

What are new goals for the mentee/mentor to work on? *Remember to use the SMART goals format. These goals can be intended for a future mentoring relationship or individual work.*

Will the formal mentorship period conclude at this time or continue?

Conclude Continue

- ▶ If the mentorship is continuing, start at step 2 to create a new agreement and goals for the extension.
- ▶ If the relationship is concluding, schedule time to complete step 5 in 3 to 6 months. Consider if a less formalized mentoring relationship will continue or if a different mentoring relationship is needed at this time.