

Strategic Mentoring Agreement



The Strategic Agreement is used to guide the structure of the mentoring relationship. This document sets desired outcomes and goals that can be used to determine what support is needed during the mentorship as well as determine the logistics of mentoring, such as where and when meetings will occur between mentor and mentee.

This agreement should be created collaboratively between mentor and mentee. If time is limited during mentoring meetings, consider having both parties review and complete the forms prior to the meeting. During the meeting, the agreement can be completed and finalized. This agreement should be periodically reviewed and updated during the mentoring relationship, as outlined in step three.

Suggested Timeline

Complete this agreement during the first 1-2 mentor meetings. This should be completed early in the relationship to ensure that realistic expectations are set.

Mentorship Details

Type of Mentorship (check all that apply):

- In-clinic:** Mentor and mentee are employed in the same clinic.
- Local:** Mentor and mentee live in the same geographic area. In-person meetings are possible.
- Distance:** Mentor and mentee live in different geographic areas. Meetings will be virtual.
- Traditional:** Mentor is more experienced individual, and mentee is less experienced.
- Peer:** Mentor and mentee are of equal experience levels.
- Reverse:** Mentor is less experienced individual, and mentee is more experienced.

What is the career stage of the mentee?

- Volunteer
- Trainee
- Early Career
- Mid Career
- Late Career
- Retired

What is the career stage of the mentor?

- Volunteer
- Trainee
- Early Career
- Mid Career
- Late Career
- Retired

Start Date: _____ **End Date:** _____

Note: Mentoring relationships can vary in their length. We recommend establishing an end date for this agreement instead of leaving it open-ended. At this time, the mentoring relationship and agreement may be extended or dissolved (see step 4).

Schedule

Frequency of mentor meetings (i.e., daily, weekly, monthly, quarterly): _____

Length of mentor meetings (this may be a range depending on how frequently you are meeting): _____

Location of mentor meetings (i.e., in clinic, off-site, virtually): _____

Tentative Mentor Meeting Schedule (fill out as far as is comfortable at this time):

Date/Time	Duration	Location	Purpose of Meeting

Where does the mentee hope to be at the end of the mentoring relationship?

Consider specific skills that you want to develop, areas of interest you would like to develop, or professional challenges you are currently facing.

Where does the mentor hope to be at the end of the mentoring relationship?

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Mentoring Goals

In this section, take your desired outcomes and create personal and/or professional goals that will help you arrive at this outcome. Goals can be created for both mentee and mentor. If multiple goals are created, be sure it is realistic to pursue the goals simultaneously.

We recommend using the **SMART** goals format to structure your goals. **SMART** goals are:

Specific: The goal has a desired outcome that is well-defined.

Measurable: There is a way to measure progress toward the goal as well as determined if/when the desired results were achieved.

Achievable: It is reasonable to expect the goal could be completed in the allotted time. The mentor/mentee have the resources needed to complete the goal.

Relevant: The goal is relevant to the Mentee and/or Mentor's personal and/or professional life.

Time-bound: There is a target date for completion of the goal.

Example: *Improve client review ratings to an average of 4-stars by improving client communication skills during appointments in the next six months.*

When developing goals, consider what resources or additional training you might need to accomplish the goal. Additionally, for larger goals, consider creating a timeline composed of smaller goals to assess progress along the way. Review and evaluate progress toward goals at each mentor meeting (more in step 3).

Goal 1:	
Timeline:	
Resources Needed:	
Potential Obstacles:	
Goal 2:	
Timeline:	
Resources Needed:	
Potential Obstacles:	
Goal 3:	
Timeline:	
Resources Needed:	
Potential Obstacles:	