

Mentoring Planning Worksheet

Identifying the *Why* before the *How* and *Who*

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1. What is your “lens” or group of interest for the purpose of today’s discussion?
(Ex: women, people of color, all new employees/graduate students)
2. What issue(s)/concern(s) are you aware of right now for this group? What information do you have so far that led you to know about this issue/concern, and the timing for a possible intervention? Is mentoring, in any form, a realistic intervention?
(Ex: alumni data, exit interviews, faculty/advisor/supervisor feedback)
3. What information do you still need in order to develop an action plan? What kinds of activities and resources are feasible? Which are not?
4. What is your primary mentoring goal(s)?
(Ex: Improve belongingness, improve retention, improve a certain skill)

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Mentoring Goals (Outcomes You Hope For)	Activities to Facilitate Mentoring (Programs, Practices, Events, Policies)	What Resources Are Needed? (Existing Programs? External Grants?)	How Will You Know If the Initiative Is Successful? (Indicators of Progress)

Remember:

- Consider the **feasibility** of the program/initiative. How sustainable is this initiative? Does it overburden certain mentoring resources?
- Consider the **scope** of the initiative. Is it exclusive or selective? Is this by design or because of resource constraints? Is there a way to provide a certain key element to a wider variety of individuals, perhaps by expanding existing initiatives such as orientation or a certain regularized retreat or gathering?
- Track your **progress**. From the *very beginning*, consider easy ways to collect data including participation and impact data, to include self-report and others who are involved (supervisors) in ways that are part of your regular activities.