

PEER MENTORING CHECKLIST

Use this checklist to prepare a mentoring plan step-by-step between mentor and mentee.

1. Determine the mentoring goal and objective based on:
 - Staff development: the organization identifies specific skills that need to be expanded or replaced, and recruits mentee(s) with the needed aptitudes.
 - Succession planning: the organization identifies individuals with potential whose skills will be gradually developed in a variety of key areas through special projects, opportunities, and assignments worked on with one or a succession of mentors.
 - Individual development for a new position: an individual is prepared for a new role due to promotion, an “acting” assignment, or new hire to the profession or organization.
2. Identify mentor
 - Who has the needed knowledge and experience for this training objective?
 - And, is a good communicator?
3. Identify mentee
 - Who has an aptitude for the particular skill needed by the organization?
 - Who has potential that the organization would like to develop through planned projects, opportunities, and assignments?
 - Who has been given a new role for which they need training and support?
 - Does the individual have the qualities looked for in a mentee, for example takes initiative, works to gain knowledge and skills, shows flexibility and willingness to try new things, listens to other perspectives?
4. Invite mentee
 - Let them know what’s in it for them to take on this particular mentoring objective. (Caution: With succession planning, future positions cannot be promised in advance, and the benefits should be presented in terms of opportunities to grow, gain new experiences, add to their resume.)
 - Tell why you need them specifically—what aptitude, prior contribution, personal quality makes them your first choice?
 - Describe how you will work together—how you will develop the work plan together, what responsibilities each will have in the relationship.
 - Offer up what you will bring as mentor to the learning experience of the mentee.

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5. Assess needs of mentee
 - What is the gap between the mentoring objective and what the mentee already knows?
 - Possible methods to assess training needs for the mentoring objective:
 - a. Ask mentee what they need to be successful, what feels easy or hard, how they describe their learning style
 - b. Ask supervisor, co-workers, other observers
 - c. Mentor observation and determination of needed skills

6. Develop mutual work plan
 - Select an appropriate project or assignment for the development of this skill, if not already determined.
 - Create a work plan with specific activities that will guide the mentee to the completed training objective. This could include recommended reading, discussion of learning activities, problem-solving issues that arise, seeking formal training opportunities that support the mentoring project.
 - Develop timeline and end time.
 - Personalize the approach to the individual mentee's learning style and needs.
 - Stay flexible.

7. Evaluate the mentoring experience
 - Ask mentee, supervisor, co-workers, or other observers for feedback on whether the mentoring objective was fulfilled.
 - Discuss what was learned from successes and failures.
 - Follow-up
 - a. Determine what is left to learn.
 - b. Consider next steps in development.
 - Congratulate and celebrate