



Participant Names:

Date of Meeting:

Instructions

This document is a tool for establishing expectations and setting goals at the beginning of a group mentoring relationship. It is meant to be used collaboratively to support both peer mentoring groups as well as small-group meetings with a mentor. To begin, make a copy of this document. Log into a Google account and select “File→ Make a Copy.” If you don’t have a Google account, select “File→ Download” to export the file. Discuss each question below and summarize your discussion in the provided box.

1. When, how, and for how long will you meet?

Questions to Consider:

- How will you meet (remotely, in-person (where?), a mix of both)?
- When will you meet (day, time, length of meeting)?
- Who will schedule (or reschedule as needed) the meeting?
- Use a meeting scheduling software like [Doodle](#) to find mutually convenient times.

2. How will you encourage everyone’s participation?

Questions to Consider:

- What do you expect from members of the group in terms of preparation and participation? How will your meetings run?
- Will you need to do anything in advance to prepare? Who will set the agenda?
- Will you divide up time during your meetings so that everyone has equal time to speak? What are your expectations for participation in remote meetings (e.g., cameras on, limit distractions etc.)?



3. How will you communicate with each other?

Questions to Consider:

- What are your expectations for reaching out to each other between meetings?
- What form of communication works best for you (e.g., email, texting, Slack, phone calls, WhatsApp, GroupMe, etc.)?
- What are your “ground-rules” for communication (e.g., trust, respect, active listening)?

4. How will you address issues of confidentiality in your meetings?

Questions to Consider:

- Will what you say in the meetings be held in confidence?
- Are any topics off-limits?

5. What will success look like?

Questions to Discuss:

- What will define success in the relationship?
- How will you assess if the relationship is working? How often will you revisit your expectations?



6. How will you resolve conflict?

Questions to Discuss:

- Problems can arise in any mentoring relationship. What is your plan for resolving issues that come up in the relationship? For guidance, review resources from the [Harvard Ombuds office](#).

7. How will you know that you are ready to move on?

Questions to Discuss:

- How long do you anticipate meeting?
- What are defined end-points that will signify that the mentoring relationship is ready to transition or conclude?



- 8. What are your goals for your participation in this mentoring group? How can this group support everyone in achieving their goals?**

Tip for Getting Started:

Consider both your individual goals as well as any goals that you share as a group.



Signature of Agreement (add or remove lines as needed)

Signature:

Signature:

Signature:

Signature:

Date:

References and Additional Resources

Content in this agreement was inspired by and adapted from the resources listed below.

Center for Faculty Development & Diversity Brigham and Women's Hospital (May, 2024), *Brigham and Women's Hospital Mentoring Agreement Template*, https://bwhmentoringtoolkit.partners.org/wp-content/uploads/2012/11/BWH-Mentoring-Agreement-12_14.pdf

Grant Review and Support Program (GRASP), Harvard Catalyst The Harvard Clinical and Translational Science Center (May, 2024), *Mentee-Mentor Expectation Form*, https://writingcenter.catalyst.harvard.edu/files/catalystwcc/files/mentor_mentee_expectation_form_example_final.pdf?m=1643642822

Huskins, W. C., Silet, K., Weber-Main, A. M., Begg, M. D., Fowler, Jr, V. G., Hamilton, J., & Fleming, M. (2011). Identifying and aligning expectations in a mentoring relationship. *Clinical and Translational Science*, 4(6), 439–447. <https://doi.org/10.1111/j.1752-8062.2011.00356.x>

Mayo Clinic College of Medicine (MCCM) (May, 2024), *Individual Development Plan (IDP): Expectations for the Mentoring Relationship*, <https://mcforms.mayo.edu/mc1400-mc1499/mc1499-20.pdf>

Pfund, C., Branchaw, J., & Handelsman, J. (2015). *Entering Mentoring* (pp.36-40). W.H. Freeman & Company. <https://cimerproject.org/entering-mentoring/>

For more resources on mentorship in clinical and translational research visit our website: <https://catalyst.harvard.edu/mentorship-in-clinical-and-translational-research/>

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