

Checklist for Completing Connection Phase

Instructions: Complete the following checklist to determine whether you have sufficiently completed the Connection phase.

- _____ 1. We have put accountabilities in place for both mentor and mentee.
- _____ 2. Our expectations are clear.
- _____ 3. Our goals are well-defined and clear.
- _____ 4. Each of our responsibilities is defined.
- _____ 5. Our norms have been developed and agreed upon.
- _____ 6. We have decided how often we should meet.
- _____ 7. We are in agreement about how often we should connect and who should initiate the connection
- _____ 8. We have articulated criteria for success.
- _____ 9. We have developed a workable strategy for dealing with obstacles to the relationship.
- _____ 10. Our work plan makes sense.
- _____ 11. Our operating assumptions about confidentiality are well-articulated.
- _____ 12. Our defined roles, responsibilities and ways of working together leave enough room for flexibility.
- _____ 13. We have discussed how and when the relationship will be brought to closure.
- _____ 14. We have developed a plan for assessing the effectiveness of the relationship.
- _____ 15. We have discussed what to do when things fall out of alignment

Source: University of Wisconsin-Madison, Research Mentoring,
<https://mentoringresources.ictr.wisc.edu/MenteeAlignmentRelevantReadings>

