

Source: Zachary, L. J. (2005) *Creating a Mentoring Culture*.
 New Jersey: John Wiley and Sons, p.38.

EXHIBIT 3.1

Sample Mentoring Planning Task Force Agenda, Meeting Number One

The objective of the first meeting is to lay solid groundwork for planning by building the team through communication, accountability, and feedback. The topics on the left frame the agenda. The processes needed to accomplish tasks, on the right, are named; the task column describes the specific group tasks that need to be addressed under each agenda item.

Agenda Topic	Process	Task	
1. Setting the stage	Review	Background	
		Link to organizational strategic vision	
		Task force charge	
2. Enabling the process	Establish	Member responsibilities	
		Ground rules	
		Operating principles	
3. Getting connected	Discuss	Hopes	
		Expectations	
		Concerns	
4. Examining results of organizational needs analysis	Share	Mentoring and mentoring experiences	
		Check out	
5. Learning from mentoring models and best practices	Discuss	Assumptions about mentoring	
		Outcomes from data, due diligence report, consultant input	
6. Envisioning the program	Clarify	Desired goals and outcomes	
		Present	Hallmarks
			Best practices (i.e., sustainability indicators)
7. Gathering learnings and insights	Discuss	Benchmarks	
		Organizational and programmatic implications	
		The "ideal," on the basis of needs and best practices from the field	
8. Defining next steps and key messages	Identify	Common themes in visions	
		Build	
		Shared vision	
8. Defining next steps and key messages	Dialogue	Learnings and insights	
		Identify	
8. Defining next steps and key messages	Identify	Next steps	
		Communication messages and timeframes	

Source: Zachary, L. J. (2005) *Creating a Mentoring Culture*.
 New Jersey: John Wiley and Sons, p.42.



EXERCISE 3.2

Action Step Accountability Checklist

Instructions: Refer to the discussion in the "Process of Implementation" section of the chapter to guide you as you work through each action step. After it is complete, check it off the list.

Action Step	Complete
Define purpose, scope, target population, learning outcomes, and benefits of the program.	
Identify success factors.	
Articulate roles and responsibilities.	
Establish mentee and mentor criteria.	
Develop pairing protocols.	
Assign accountability for managing, overseeing, and coordinating implementation.	
Prepare a marketing and communication strategy.	
Establish continuous feedback loops.	
Ensure visible support from the top.	
Design education and training opportunities for the organization as a whole as well as for mentors, mentees, coaches, and key support personnel.	
Set up a reward, recognition, and learning celebration plan.	
Map out a contingency plan that addresses potential obstacles.	
Plan rollout and full implementation.	
Gather and share stories and best practices.	

An earlier version of this checklist appeared in Zachary (2003b).