Questionnaire for Aligning Expectations in New Mentoring Relationships

Mentor / Supervisor:		Mentee / Student:	
Time Period:		Dept / Program:	

Read each pair of statements and estimate your position on each. For example with statement 1, if you believe strongly that the ideal mentoring relationship focuses on the research interests, you would circle "1" or "2". But if you think that the ideal relationship focuses on the working and communication styles, you would circle "3" or"4".

	The Mentoring Relationship					
1	For an ideal mentoring relationship, it's important for both mentor and mentee to have similar research interests	1	2	3	4	For an ideal mentoring relationships, it's important for both to have similar working and communication styles
2	Mentors should only accept mentees when they have specific knowledge of the mentee's chosen topic	1	2	3	4	Mentors should feel free to accept mentees from a broad range of disciplines, to provide overall guidance
3	A personal and friendly relationship between mentor and mentee is important for a successful relationship	1	2	3	4	A professional relationship is advisable to maintain objectivity for both mentee and mentor during their work
4	The mentor is responsible for providing emotional support & encouragement to the mentee	1	2	3	4	Personal counselling and support are not the responsibility of the mentor; mentees should look for these elsewhere
5	The mentor should develop an appropriate plan and timetable of research and study for the mentee	1	2	3	4	The mentee should develop their own plan and timetable of research and study, and seek input from the mentor as needed
6	The mentor should decide how frequently to meet with the mentee	1	2	3	4	The mentee should decide when she/he wants to meet with the mentor
7	The mentor should check regularly that the mentee is working consistently and on task	1	2	3	4	The mentee should work productively and independently, and not have to account for where time is spent
8	The mentor is responsible for ensuring that the mentee is introduced to the appropriate services of the department and university	1	2	3	4	It is the mentee's responsibility to ensure that she/he has located and accessed all relevant services and facilities
	Research Topics					
9	It is the mentor's responsibility to select a research topic for the mentee	1	2	3	4	The mentee is responsible for selecting her/his own research topic
10	It is the mentor who decides which theoretical framework or methodology is most appropriate	1	2	3	4	Mentees should decide which theoretical framework or methodology they wish to use
11	When choosing research topics, I prefer to work on projects with potential for high payoffs, even if it involves high risk	1	2	3	4	When choosing research topics, I prefer to work on projects that have a high & safe chance of success, even if the payoff is low
12	I prefer to work on projects independently by myself	1	2	3	4	I prefer to work on projects collaboratively with other team members.
	Dissertation, Papers, and Presentations					
13	The mentor should insist on seeing all drafts of work to ensure that the mentee is on the right track	1	2	3	4	Mentees should submit drafts of work only when they want constructive criticism from the mentor
14	The mentor should assist in the preparation of presentations & writing of the thesis, papers, and reports	1	2	3	4	The preparation of presentations & writing of the thesis, papers, and reports should be the mentee's own work
15	The mentor is responsible for decisions regarding the standard of presentations, the thesis, papers, and reports	1	2	3	4	The mentee is responsible for decisions concerning the standard of presentations, the thesis, papers, and reports

Using the "Questionnaire for Aligning Expectations in New Mentoring Relationships"

The Role of Expectations

Aligning expectations and goals is a constant theme in the literature on mentoring relationships and supervision. The expectations do not need to be identical for both sides (and would be unrealistic), but a thorough discussion of expectations can greatly increase the likelihood of a productive collaboration and minimize conflicts. Relevant expectations in the context of research mentoring and supervision can relate to:

- understandings of what research is
- appropriate roles of mentors and mentees, supervisors and employees, etc
- what is professional behavior and how respect is expressed to the mentor and mentee
- the likely consequences of asking questions or acknowledging problems
- how *both* the mentor and mentee can be pro-active and actively listen to each other
- and many other issues.

Mismatches of expectations are a constant theme in the literature on supervision and mentoring. To help bring some of these differences in expectations into the open for discussion, a possible strategy is using this questionnaire. This tool has been designed as a discussion starter for use by supervisors and students.

Our experience suggests that the tool is especially effective when users of this form recognize that
- there are no "right" answers to the items on the questionnaire
- responses are likely to be different at different stages of academic or professional progress
- even identical numerical responses can correspond to different thoughts and expectations
- the purposes of using this form are:
  - to structure a fruitful discussion about the reasons why different responses may have been selected, and
  - to decide on appropriate ongoing actions for the current participants and stage

Suggestions for Use

We suggest the following process for using this form.
- make sure both parties have a blank copy of the questionnaire
- both parties fill out the questionnaire separately
- set up a meeting that will be focused on this questionnaire
- at the meeting, start by comparing the responses given for each statement by each person
- discuss thoroughly the significance of each response (i.e. answer what each response means for each person)
- provide suggestions on how you'll address different responses and expectations
- consider repeating the process at various points (e.g. once per year, during critical transitions of the mentee's academic timeline, etc)