



Tool 4

Learning Goals and Intention Setting Worksheet

This worksheet provides a three-step, inquiry-based approach for setting goals through a series of questions that facilitate an interactive process.

Keeping the mentee's needs, as a learner and leader, at the centre of this process is critical, given the inherent power imbalance that exists in many mentoring relationships. As mentor-coach, our ability to self-manage and refrain from interjecting, interpreting, or advising the mentee regarding their goals or intentions is important. If something has been missed or avoided, reflecting this back to the mentee and allowing them to choose honours the space created and the integrity of the process.

Step 1: Scanning and Consulting

Stepping back and providing the opportunity for the mentee to scan and consider any previous thinking, planning, goal setting, feedback, or conversations as they set their professional learning goals or intentions for the mentor-coaching process ensures alignment and prevents working at cross purposes.

Areas to scan include

- areas of focus for mentor-coaching (Tool 2)
- feedback (own reflection/self-assessment and feedback from others)
- school improvement plan
- annual learning plan
- evaluations
- assessments

Questions to consider:

1. What pre-existing learning plans or areas of focus do you want to draw on to inform your learning goals and intentions in our work together?

2. What leadership or instructional competencies, practices, or frameworks do you want us to consider, as you set your goals and intentions?



3. How does feedback you've received from yourself or others factor into your learning intentions?

4. What prior thinking or conversations would you like to integrate into your intention setting and goals?

5. What goal or intention, if met, could make the most difference to your learning and growth?

6. If your success were completely guaranteed, what goals or intentions would you set?

7. What goal or intention, if set today, could ripple out to create new possibilities for your learning and growth?

8. As you consider other types of learning goals (e.g., qualities, understanding, expertise, skills, time management), what other growing edges feel important to consider?

9. As you consider your top three priorities in your role, where do they fit into the goals you are setting?

10. What part of you are you not considering, as you set your goals for our work together?



Step 2: Drafting Learning Goals and Intentions

Specificity and straightforwardness are key to setting goals as they allow the mentee to articulate and to measure what success will look like. Also, it is important for both the mentee and the mentor-coach to remember that this is a work in progress.

Questions to consider:

1. Where are the growing edges that you want us to stay focused on?
2. What are your goals for yourself in these areas?
3. As you scan the competencies and domains within the leadership framework, where are your growing edges? Which feels the most important?
4. As you consider who you need to be as leader to realize your goals, what is required of you? What intention or goal can you set to support this?
5. What other intentions or goals do you want to set?
6. How can we simplify this list for you?
7. What intention sits underneath all the others?



Step 3: Checking for Relevance, Clarity, and Energy

Once the mentee has drafted goals and intentions, it is important to invite her or him to review and edit the language to ensure that the goals feel specific and extremely relevant.

Questions to consider:

1. On a scale of 1 to 10, how much pull is there around each goal you have identified? If below 7, how you can increase engagement and commitment?
2. How might you tighten up this goal (intention) to make it even more specific for you?
3. How will stepping into this goal (intention) serve you?
4. What do you want to pay attention to as you work toward this goal?
5. How aligned do your goals feel with your vision?
6. What sits at the centre of this goal for you? (gauges intentionality)
7. How are you feeling about the intentions you have set for our work together? (gauges energy)
8. On a scale of 1 to 10, how attainable is each of these goals? If below 7, how can you tweak the language or focus to make it more attainable?
9. What level of stretch is required? (gauges challenge)



Ongoing

Once goals have been set, a conversation about logistics is needed to support the required action or development plan. This includes

- designing a concrete plan of action for each goal or intention
- identifying resources (internal and external) required to support or sustain the intention
- identifying what “stepping into the goal” will look like
- securing accountability
- creating a way to measure or track learning and growth
- establishing a regular routine of reviewing progress and learning to keep the goals and intentions alive and beckoning

These details can be revisited as often as progress and time require.