

Edmonton Women in Finance Mentorship Agreement

1. Purpose:

This agreement is created to ensure mentees and mentors develop a mutual understanding of the expectations of the relationship. It will aid each mentor/mentee pair:

- Establish communication expectations.
- Identify goals for the mentoring relationship.
- Outline skill areas to be enhanced or developed through this partnership.

2. Duration of Program:

The mentorship term is expected to last a minimum of pre-determined months. The relationship can continue for longer if agreed on by both the mentor and mentee.

3. Meeting Sessions:

Meetings can be held virtually or in-person, at predetermined locations and times. All sessions must be booked in advance and adequate notice given to the other party if meeting location, dates and times will be changed.

4. Frequency and Duration of Meeting:

Meetings are expected to be held at least once a month. We suggest Mentees take initiative and be the driving force of the mentorship relationship. Mentees should schedule all meetings, prepare, and share agenda for meetings ahead of time with their mentors.

5. Confidentiality:

This mentorship relationship, as well as all information shared between mentor and mentee pairings are confidential. However, please be aware that the mentor/mentee relationship is not considered a legally confidential relationship and thus communications are not subject to the protection of a legally recognized privilege. The mentor agrees not to disclose any information pertaining to the mentee without their written consent. Confidential information does not include any information that is disclosed and as a result of such disclosure, would cause the Mentor to believe there to be imminent or likely risk of danger or harm to the Mentee or others. The Mentee also acknowledges their continuing obligation to raise any confidentiality questions or concerns with the Mentor or program coordinators in a timely manner.

6. The Relationship:

The Mentee understands that in order to enhance the relationship, they agree to communicate honestly, be open to feedback and assistance, and to create the time to participate fully in the program.

As a Mentor, I agree to:

- Meet as mutually scheduled, on time and prepared.
- Provide at least 24 hours advance notice if there is a need to reschedule.
- Hold and review your agenda for the meeting session.
- Hold you accountable for accomplishing agreed upon tasks.
- Support by listening without judgement and speaking honestly.
- Refer the mentee to services and resources that may help them.
- Always maintain confidentiality except as indicated above.

As a Mentee, I agree to:

- Meet as mutually scheduled, on time and prepared.
- Provide at least 24 hours advance notice if there is a need to reschedule.
- Prepare and present agenda for the meeting session.
- Be accountable for accomplishing agreed upon tasks.
- Establish clear goals and desired outcomes for each meeting session.
- Actively participate in the mentoring session by staying focused on agenda items and having open/honest communication.
- Share all relevant information with my mentor.
- Take responsibility for what I want to achieve through the program.
- Communicate any concerns that arise to my mentor and program coordinators.