



TAA Mentorship Self-Assessment Worksheet

This worksheet serves as a valuable tool to reflect on your accomplishments, recognize opportunities for improvement, and outline actionable steps to take toward achieving your aspirations. Through honest self-assessment and intentional planning, you can build the foundation for sustained growth and success.

Section 1: Goals Overview

Identify and explain 1-2 goals and choose a target date for when you want to achieve these goals by.

- **Goal #1:**
- **Target Date:**

- **Goal #2:**
- **Target Date:**

Section 2: Current Position Rating

On a scale of 1-10, with one being not close to achievement and 10 being very close to achievement, where do you feel you currently stand in reaching Goal #1?

(Current Rating: _____)

On a scale of 1-10, with one being not close to achievement and 10 being very close to achievement, where do you feel you currently stand in reaching Goal #2?

(Current Rating: _____)

Section 3: Personal Self-Assessment for Goal #1

**What has contributed to you being at this point for Goal #1 in your mentorship journey?
Think about both your strengths and achievements/progress and document them here.**

1. Strengths:

-
-

2. Achievements/Progress:

-
-

What needs to happen or change for you to move from your current position to being closer to your target achievement for mentorship Goal #1?

1. Areas Needing Improvement:

-
-

2. Actions to Take:

-
-

Section 4: Personal Self-Assessment for Goal #2

Current Rating:

**What has contributed to you being at this point for Goal #2 in your mentorship journey?
Think about both your strengths and achievements/progress and document them here.**

1. Strengths:

-
-

2. Achievements/Progress:

-
-

What needs to happen or change for you to move from your current position to being closer to your target achievement for mentorship Goal #2?

1. Areas Needing Improvement:

-

-
- 2. **Actions to Take:**

-
-

Section 5: Reflection and Next Steps

Document your current self-reflection date and also identify a future date that you want to target for your next self-assessment and mark it down in your calendar so that you have a timeline to work towards. *Note that a three to six month window between self-assessments is recommended.*

- **Reflection Date:**
- **Next Self-Assessment Date:**

Reflection:

- What did you learn from this self-assessment?
- How will you apply these insights to achieve your goal?

Next Steps:

- Plan and schedule the next steps to make progress towards your goal.

Here are a few self-assessment examples that you can reference for a framework and ideas for how to kickstart your own self-assessment.

Example Self-Assessments

Example 1: Goal - Get promoted to a senior analyst position within 12 months

Current Rating: 5

What has contributed to you being at this point?

1. Strengths:
 - Strong analytical skills
 - Good relationship with team members
 - Consistent performance
2. Achievements/Progress:
 - Completed relevant training programs
 - Received positive feedback in quarterly reviews

- Successfully led a minor project

What needs to change for you to move from your current position to a higher number?

1. Areas Needing Improvement:
 - Advanced project management skills
 - Greater visibility within the organization
 - More involvement in strategic projects
2. Actions to Take:
 - Enroll in an advanced project management course
 - Volunteer for high-visibility projects
 - Network with senior management

Example 2: Goal - Improve public speaking skills by delivering 5 presentations within 6 months

Current Rating: 3

What has contributed to you being at this point?

1. Strengths:
 - Willingness to improve
 - Basic public speaking skills
 - Supportive colleagues
2. Achievements/Progress:
 - Joined a public speaking club
 - Delivered 1 presentation with positive feedback

What needs to change for you to move from your current position to a higher number?

1. Areas Needing Improvement:
 - Overcoming nervousness
 - Structuring presentations better
 - Engaging the audience more effectively
2. Actions to Take:
 - Practice public speaking weekly
 - Seek feedback from experienced speakers
 - Attend workshops on presentation skills