

# Checklist for the first meeting

Use this checklist to plan initial meetings with your mentee in light of what you hope to help them achieve over the long-term.

|                                                                                                                                                                                                                                                                               |                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|
| <p><b>Prior to meeting with your mentee:</b></p> <ul style="list-style-type: none"> <li>• Check your mobile phone is turned off (if possible)</li> <li>• Make sure you will not be disturbed</li> <li>• If possible, arrange the furniture to promote conversation</li> </ul> | <input type="checkbox"/> |
| <p><b>Introductions</b></p> <ul style="list-style-type: none"> <li>• Say a little about yourself, explain the goals for the meeting and discuss how confidentiality should be handled</li> </ul>                                                                              | <input type="checkbox"/> |
| <p><b>Discuss what each of you perceives as the expectations and the boundaries of the mentoring relationship</b></p> <ul style="list-style-type: none"> <li>• You might choose to use the Role Perceptions Rating Scale</li> </ul>                                           | <input type="checkbox"/> |
| <p><b>Discuss and record any issues that may affect the mentoring relationship such as time and financial constraints, lack of confidence, new to the role, etc.</b></p>                                                                                                      | <input type="checkbox"/> |
| <p><b>Get to know your mentee</b></p> <ul style="list-style-type: none"> <li>• Review the mentee's work history and current experience and qualifications</li> </ul>                                                                                                          | <input type="checkbox"/> |
| <p><b>Discuss and record the mentee's <i>immediate and long-term goals</i> (if known)</b></p>                                                                                                                                                                                 | <input type="checkbox"/> |
| <p><b>Arrange a meeting schedule (try to meet at least once a month or every 6 weeks)</b></p>                                                                                                                                                                                 | <input type="checkbox"/> |
| <p><b>Record topics discussed, any actions to be taken and feedback given at each meeting</b></p> <ul style="list-style-type: none"> <li>• Ensure that both parties have copies</li> </ul>                                                                                    | <input type="checkbox"/> |
| <p><b>Confirm date and time for next meeting</b></p>                                                                                                                                                                                                                          | <input type="checkbox"/> |