

3.2 First Meeting Checklist

Before Meeting

- ❑ Confirm meeting with mentee via phone call or e-mail.
- ❑ Review mentee application, if your program uses an application.
- ❑ Have a clear game plan for this first meeting. This will help relieve any nervousness or anxiety you may have and will lead to a successful first meeting.

At the First Meeting

- ❑ Start to build your relationship with your mentee. This section provides several “getting acquainted” questions and activities. Choose one or two of these activities to complete with your mentee.
 - Commonalities
 - Uniqueness
 - Hobbies
 - Family Tree
 - 10 Years Activity (If you prefer, save this exercise as a springboard for goal setting.)
 - Additional Ice Breaker Questions
- ❑ Establish overall purpose of mentoring relationship.
 - Review the checklist of what a mentor is and isn’t using the “Definition of a Mentor Worksheet.”
 - Explain why you are a mentor.
 - Learn the mentee’s initial expectations of this relationship.
- ❑ Complete a mentoring agreement (see examples in this section) and include the following elements.
 - Establish a meeting schedule.
 - Discuss what is the best way to meet.
 - Discuss when and how often to meet.
 - Discuss where to meet.
 - Discuss what to do if cannot make the meeting.
- ❑ Complete a confidentiality agreements as indicated.
- ❑ Verbally or via e-mail confirm the date, location and time of your next meeting.
- ❑ Share the next meeting assignment — start to set general goals.