

Worksheet 2: Planning for first meetings – A mentor’s checklist

Adapted from *Mentoring towards excellence: Section 4: Handbook and guidelines for mentors and mentees*. (2001). Coventry, England: Association of Colleges and the Further Education National Training Organisation

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

- ___ Arrange first meeting with a prospective protégé.
 - ___ Explain the goals for meetings and ask how confidentiality should be handled.
 - ___ Discuss with your protégé what you both perceive as the boundaries of the mentoring relationship.
 - ___ Review the protégé’s current experience and qualifications. Record these on a professional development plan (see worksheet 4).
 - ___ Discuss and record the protégé’s immediate and long-term goals (worksheet 4). Explore useful professional development experiences in view of these goals. Discuss options and target dates.
 - ___ Discuss and record any issues that may affect the mentoring relationship such as time, financial constraints, lack of confidence, or newness to the role, etc.
 - ___ Arrange a meeting schedule (try to meet at least once a quarter). Record topics discussed and feedback given at each meeting. Keep meeting records be kept confidential and in a safe place.
 - ___ Discuss the following activities that can form part of your mentoring relationship:
 - Giving advice on strategies for improving teaching or research
 - Organizing observation(s) of teaching and providing constructive feedback
 - Organizing a session of work shadowing (in a campus or other employment setting)
 - Consulting on issues or concerns the protégé has with colleagues or study / research groups
 - Providing feedback from other sources (students, faculty, administrators, and other mentors in or outside the university)
 - ___ Create a mentoring action plan that reflects different professional development needs at different stages of the protégé’s graduate program.
 - ___ Encourage your protégé to reflect regularly on his or her goals, achievements, and areas for improvement. Ask the protégé to compose a brief reflection essay (e.g., 1/2 page) prior to each meeting.
 - ___ Amend the mentoring action plan as needed by focusing on the protégé’s developing needs.
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