Worksheet 3: Planning for first meetings—A protégé’s checklist

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

___ Arrange first meeting with a prospective mentor.

___ Explain your goals for meetings and ask how confidentiality should be handled.

___ Discuss with your mentor what you both perceive as the boundaries of the mentoring relationship.

___ Review your current experience and qualifications. Record these on a professional development plan (see worksheet 5).

___ Discuss and record your immediate and long-term goals (worksheet 5). 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 with your mentor (try to meet at least once a quarter). Record topics discussed and feedback given at each meeting. Request that meeting records be kept confidential and in a safe place.

___ Discuss with your mentor the following activities that can form part of your mentoring relationship:

• Getting 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)
• Getting advice on issues or concerns with colleagues in study or 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 your graduate program.

___ Encourage your mentor to reflect regularly with you on your goals, achievements, and areas for improvement. Compose a brief reflection essay (e.g., 1/2 page) prior to each meeting.

___ Amend your mentoring action plan as needed by focusing on your developing needs.