

Worksheet 3: Planning for first meetings—A protégé’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 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.
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