

Mentorship Checklist

Prior to 1st Introduction Meeting

Mentor

- Prepare biography of yourself Include:
 - Background information
 - Education level/field of study
 - Employment history
- Identify the time you have set aside to fill the role as a mentor (daily, weekly, monthly)
- Identify strengths you could offer to mentee

Mentee

- Prepare biography of yourself Include:
 - Background information
 - Education level/field of study
 - Employment history (resume if applicable)
- Prepare a list of your goals (personal/professional):
 - Short term (1-6 months)
 - State goals
 - State steps to complete
 - Near term (6-24 months)
 - State goals
 - State steps to complete
 - Long term (24+ months)
 - State goals
 - State steps to complete
- Be prepared to discuss:
 - Things that I like and do well.
 - Things that I don't like and do well.
 - Things that I don't like and don't do well.
 - Things that I like and don't do well.

1st Introduction Meeting

- Exchange biographies to explain previous experiences (build rapport)
- Discuss:
 - Interest and goals from mentor and mentee
 - Reason why requesting to have a mentor
 - Identify if mentor and mentee needs can be met through a mentorship program (compatibility, achievability of needs to be met).
 - Expectations (roles and responsibilities) of both the mentor and mentee
 - Future milestones (encourage new ideas and strategies to accomplish milestones)

- Availability of contact between both parties during non-meeting days (days, nights, and/or weekends)
- Relationship (Professional) etiquette
- Discuss follow-up meetings:
 - How: telephonic/face to face etc.
 - When: daily, weekly, monthly
 - Where: office, conference room etc.
- Summarize your meeting by creating a document together show administrative notes from discussed items.

Follow on Meetings

- Begin with reviewing your administrative notes from your previous meeting(s).
- Discuss recent accomplishments/ barriers of the mentee (education, professional training etc.).
- Discuss possible courses of action to overcome barriers (mentor may provide books, scholarly articles, journals)
- Modify goals as needed
- Summarize your meeting by creating a document together show administrative notes from discussed items.
- Discuss follow-up meeting(s) or if Mentorship process is complete.