First Meeting Checklist

Get to Know Each Other
☐ Share information about your professional and personal interest in wellness and any other personal information/interests that would help the mentee get to know you
☐ Learn about the mentee’s professional and personal interest in wellness and goals for their project
☐ Ask the mentee how you can best support their completion of the project

Establish Guidelines
☐ When and how you we meet? Group Meetings with both mentors and the mentee should be scheduled at least quarterly.
☐ Who will schedule the meetings (Doodle Poll, Set Dates)?
☐ How will you communicate between meetings (email updates)?
☐ What agenda format will we use?
☐ Review goals for the mentoring relationship

Confirm Next Steps
☐ Review mentee’s project goals to achieve before the next meeting (Encourage the use of SMART goals)
☐ Encourage the mentee to put together a relatively detailed timeline to complete the project
☐ Schedule date and format of next meeting

Cultivating the Relationship
Follow-up meetings will be focused on helping the mentee complete their project (project planning, developing a realistic timeline, overcoming barriers to project completion, etc.)