

## **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.)