

First Meeting Checklist

Get to Know Each Other

- Share information about your professional and personal life
- Learn something new about your mentee/mentor

Establish Guidelines

- When and where will we meet?
- How will we schedule meetings?
- How will we communicate between meetings?
- What agenda format will we use?
- Will there be any fixed agenda items to be discussed at every meeting (aside from checklist)?
- How will we exchange feedback?
- How will we measure success?

Confirm Next Steps

- Schedule date, time, and place of future meetings
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Mentoring Meeting Journal

Use this page to record and discuss points in each of your mentoring meetings. Use these notes to complete the [survey](#) within 7 days of each meeting.

Meeting date: _____

Check-in: (how are things going, work/life balance)

Goal Discussion: (goal setting/progress to date)

Progress on Promotional Checklist (if applicable)

Action Items: (to-do's before the next meeting)

Next Meeting Date: