

Setting Up the Initial Meetings

Prior to the First Meeting

Mentees	Mentors
Set Up the Meeting	
<ul style="list-style-type: none"> ▪ Schedule the Initial Meeting. Take responsibility for scheduling the first meeting with your mentor, setting aside at least 60 minutes. The main purpose of this meeting is to get acquainted and establish goals and expectations for your mentoring relationship. 	<ul style="list-style-type: none"> ▪ Respond to Meeting Request. Your mentee will be asked to reach out to you to ask for a meeting of 60 minutes or more. If however, you do not hear from your mentee for a month after being paired, please initiate contact to make sure the relationship gets underway. The main purpose of this meeting will be to get acquainted and establish goals and expectations for your mentoring relationship. Consider sending a copy of your CV to your mentee to read before your first meeting.
Reflect on Your Expectations for the Relationship	
<ul style="list-style-type: none"> ▪ Clarify Your Interests and Needs. Identify your personal and professional goals for the mentoring relationship. Consider what you hope most to learn, and prepare a list of questions you would like to ask your mentor. You might focus on promotion, grant writing, time management, publishing, or balancing competing demands in work and family. Be realistic – discussing three topics per meeting is probably a challenge! ▪ Draft a Copy of Your Goals. Write down your goals for your career development and for your mentoring relationship. Bring a copy to your first meeting with your mentor. 	<ul style="list-style-type: none"> ▪ Recognize the Value and Limits of the Relationship. In your first meeting, your mentee will be sharing with you his or her needs and goals. Remember: <ul style="list-style-type: none"> ○ You are not expected to meet all of your mentee’s needs. Consider the ways in which you are prepared to offer support. ○ Recognize that it will be up to your mentee to decide how to integrate your guidance into his or her own evolving style and approach. ○ When you meet, recognize opportunities for your own enrichment – mentors often find value in the questions or fresh perspectives of mentees.
Share Your Professional Experiences	
<ul style="list-style-type: none"> ▪ Send Your CV to Your Mentor and Confirm Your Meeting. A week prior to your meeting, send a copy of your CV, in COAP format, to your mentor. 	<ul style="list-style-type: none"> ▪ Review Mentee’s CV. Before meeting, your mentee should have sent you a copy of his or her CV. If you can, look over it prior to your first meeting and think about links between their experiences and interest and yours.



Your First Meeting

The following is a sample agenda for a first meeting. Regardless of whether you follow this agenda, please ensure that you discuss the mentee's goals and history, and exchange expectations for what you hope to gain from the mentoring relationship.

	Mentees	Mentors
Introduction and CV Exchange (15 min)	Share your professional experiences and academic background.	Share your experiences, especially those relevant to your mentee's experiences and aspirations.
Review Goals (15 min)	Share goals for your professional development and mentoring relationship.	Reflect on which goals you're best positioned to assist with, and in which ways. Let mentee know which you cannot help with, and point them towards alternative resources, if possible.
Refine Goals and Develop Strategies (15 min)	Discuss with your mentor which goals you can work towards together, and the required first steps. Determine the focus of your next meeting.	With mentee, choose a few goals and first steps.
Establish Meeting Times (10 min)	Discuss times, dates, and places for meetings. Plan to meet for 60 minutes, at least once a month.	Discuss with your mentee your preferences for between-meeting contact (e-mail, office visits, etc) as well as your availability. Ask them about their constraints; do not assume that they do not have preferences.
Wrap Up (5 min)	Express appreciation! Thank your mentor for his or her time and effort. Recap what you'll be doing to follow up, and what you'll be discussing at your next meeting	Review and confirm any commitments you've made to mentee.

Follow-Up and Subsequent Meetings

Follow up promptly on any commitments you've made to each other. Mentees should take responsibility for setting up subsequent meetings, but mentors, if you do not hear from your mentee within a few weeks, please reach out to ensure that the relationship retains momentum.

At each meeting, review progress against mentee's career goals. It is best to do this at the beginning of each meeting.