Initiation:
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?
☐ How will we exchange feedback?
☐ How will we measure success?

Partnership Agreement
☐ Review partnership agreement, modify if desired, sign and exchange
☐ Review goals for the mentoring relationship

Confirm Next Steps
☐ Schedule date, time and place of future meetings