Mentee Meeting Checklist

Prepare before the first meeting with your mentor...

- Take the initiative!! Contact your mentor, introduce yourself, and set up the first meeting. Agree on confidentiality and no-fault termination.
- Self-assessment: What are my goals? How can a mentor help me meet my goals? Consider the specific areas for which you require mentoring. What skills do I need to learn or improve? What are my competency levels and skills as a teacher, researcher, administrator, and clinician? (Complete and provide a copy of your Mentee Self-Assessment and IDP)
- Think about your developmental network of people you turn to for career advice and support. These include: colleagues, mentors (scholarly, research, career advisors, peer-mentors), trainees, mentees, friends and family. What purpose will this mentoring relationship serve and what guidance do I seek?
- Update and provide a copy of your CV to your mentor. Ask your mentor about his/her career path.
- Review promotion and tenure criteria for your track and rank.
- Mentee should prepare an agenda for the meeting.

During the meeting...

- Discuss your short and long term professional goals and proposed project. Work together to develop steps to reach these goals including mentoring needs, skills, resources and a timeline. (Review IDP.)
- Review your self-assessment and discuss the specific skills and areas in which you need mentoring. Is it for a specific project or a specific skill? Be clear about a timeline. Do you have any deadline? Recognize that you are asking for a favor that requires time and commitment.
- Determine the frequency of meetings. This will vary based on individual needs (from once a month to at least twice a year.) Interactions can range from brief email or phone updates to lengthy meetings.
- Establish meeting guidelines. When and where to meet? How to schedule meetings? How to communicate between meetings? What agenda format will be used? How will feedback and evaluation be exchanged?
- Discuss expectations, roles, and responsibilities of the mentoring relationship.
- Partnership agreement, modify if needed and sign. Agree on confidentiality and no-fault termination.
- Suggest potential topics for future meetings based on career advancement interventions, skills development, and/or work life balance.

After the meeting...

- Establish your own checklist to track progress. Keep and ongoing portfolio of activities and works in progress. Make a timeline and follow.
- Send thank you note (show gratitude)
- Create agenda for each meeting and email in advance.
- Re-evaluate the mentoring agreement at least annually.

Indiana University School of Medicine Faculty Mentoring Resource Website, Office of Faculty Affairs and Professional Development [http://faculty.medicine.iu.edu/mentoring](http://faculty.medicine.iu.edu/mentoring)