



## Your First Meeting

*Objective:* This worksheet offers ideas and activities to help mentors and mentees plan their first meeting together.

Your first meeting is critical to the mentoring relationship as it sets the tone for your work together. This worksheet will guide you through the process of getting to know one another, establishing rapport, and outlining expectations. The initial meeting should also be a time used to set the ground rules for your relationship.

Accomplishing the suggestions below by the end of your first meeting will get your mentoring relationship off to a strong start:

### 1. Get to know each other


It is important to give this meeting your full attention, so plan for at least one hour of uninterrupted time. During this time, do not multitask; focus on each other and the mentoring relationship.

Begin with an informal conversation about your background, professional career, career goals, interests, and hobbies. Review your partner's resume or CV before you meet. Ask questions about their interests, career path, and educational history so that you can find commonalities. These connections will help you develop rapport and trust with your mentoring partner.

### 2. Outline expectations

Communication is one of the keys to any successful relationship, and mentoring is not an exception. Discuss the following topics together and agree on the boundaries for your partnership, or "rules for engagement."

- How often you will meet
- How you will schedule meetings (e.g., with you directly, or with the help of an assistant)
- When you are available and how you prefer to be contacted (e.g., email, text or phone)
- How you will handle differences of opinion
- How long your meetings will last and where/in what format they will take place
- Decide whether you want to use an agenda for your meetings. If you do not use an agenda, develop another strategy to keep focused on your goals. Set aside the first few minutes to check-in with one another or leave the last ten minutes to connect on unrelated matters.
- Decide who will develop the meeting agenda (typically, the mentee) and should it be sent prior to the meeting. It might be helpful to take notes during your meetings or summarize the main points after your meeting. Then, you can review these notes when planning the next agenda so that important items are not omitted.
- Decide how to measure your progress in the program. Agree on a plan to celebrate your successes and offer feedback if goals are not achieved.

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- Sign the NORDP Mentoring Compact and discuss how to create a safe and brave space in the mentoring relationship. Consider what topics can be addressed and what areas are off limits.

### **For Mentors**

- Many mentors appreciate the opportunity to “give back” to their profession or institution. Consider what you hope to gain from the mentoring relationship.
- Ask your mentee how you can help if they are experiencing difficulties. Find out what motivates your mentee.
- Discuss what your roles and responsibilities will be for the partnership.

### **For Mentees**

- Mentees appreciate the opportunity to accelerate the learning curve by participating in a mentoring relationship. Talk about what you hope to gain from the partnership.
- Mentees must take initiative and responsibility for their own development.
- Discuss what your roles and responsibilities will be for the partnership.
- Think about how you like to be motivated or encouraged when you encounter difficulties or challenges.
- Remember: the mentee drives the relationship, and the relationship is reciprocal in nature.

## **3. Review the mentee’s goals and objectives**

Mentoring relationships provide an opportunity for the mentee to focus on their goals. Review the mentee’s goal worksheet or Individual Professional Development Plan and create a plan to accomplish these goals. Prioritize each goal and decide what activities would be most beneficial.

Offer your mentee enough encouragement to reach for goals that require a bit of a stretch and be willing to revise as needed.

## **4. Identify one goal to work toward by the next meeting**

This may be a smaller or sub-goal; however, it will provide some discussion and activity for the next meeting. After you have chosen goals for the next meeting, discuss the following questions:

- What action items are there to assist us in achieving this goal?
- Identify any assignments for mentee or mentor that will facilitate progress toward the goal.