CHECKLIST FOR THE FIRST MEETING (INITIATING THE RELATIONSHIP)

The mentee should take responsibility in setting up this meeting; which should occur within a few weeks of your being assigned a mentor.

The purpose of this meeting is to get acquainted, establish guidelines and goals of your relationship.

Getting To Know Each Other (Do this section if this information was not discussed sufficiently in interview)

- ☐ Share information about your professional and personal life
- ☐ If applicable, talk about your own mentoring experiences
- ☐ Share CV's
- ☐ Review and discuss Roles and Responsibilities for Mentors and Mentees
- ☐ Discuss potential limitations (rotation schedules, family responsibilities, etc.)

Establish Guidelines for Future Meetings

- ☐ Agree on frequency and location of meetings
- ☐ Decide how meetings will be scheduled
- ☐ Discuss how communications will be handled between meetings
- ☐ Decide if there will be fixed agenda items at every meeting
- ☐ Share preferred method for feedback
- ☐ Establish structure of future meetings (e.g. 10 minute "check-in", 20 minutes for "burning issues" and 30 minutes to plan next steps and "assignments")

Career Mentoring Discussion

- ☐ Establish short and long term career goals
- ☐ Establish career track, changes in percent effort (if applicable) and most pressing needs
- ☐ Discuss potential topics for future meetings

Content-Specific Mentoring Discussion

- ☐ Establish short and long term content-specific goals
- ☐ Discuss potential content-specific (e.g., clinical, research, education, administrative) topics
- ☐ Identify content-specific topics for future meetings (e.g., clinical operations/patient issues, teaching students or residents; basic or clinical research budgets, collaborations, grant writing)

End of meeting

- ☐ Schedule date, time and location for next meeting

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