**First Meeting Checklist for Mentor**

The first meeting in a mentoring relationship is crucial, as this is where the mentor and mentee set out how the relationship will work and agree the objectives and outcomes to be achieved. The key objective of the meeting is to produce an agreement that will underpin what the relationship is about and how it will operate.

This checklist is intended to be used by Mentors to support you to structure your first meeting with your mentee. You do not need discuss everything on this form; it is only meant to guide you toward a successful first meeting!

|  |  |
| --- | --- |
| Tell the mentee something about yourself. | * Background * Skills and experiences * Strengths, both personal and professional * Why you’ve decided to be a mentor |
| Learn about the mentee. | * Background * Skills and experience * Why did you decide to be mentored? |
| Agree clear ground rules, using the Mentoring Agreement Form. | * Confidentiality * Mentoring role and expectations * Professional boundaries * Time commitment: how much and how often * How you will communicate with one another between sessions, if at all * Location of meetings * Expectations regarding preparation for mentoring meetings |
| Do some mentoring!  Use the Mentoring Agreement Form to record the outputs of this discussion. | * Help the mentee further clarify and identify exactly what they want to address * Define what type of issue(s) they want to work on:   + Personal growth   + Professional development   + Organisation change   + Relationship facilitation * Identify clear action points, both long-term and short-terms (What they are going to do between now and the next mentoring session?). |
| Session review | A review of how the session went, from both the mentee and the mentor. This is the opportunity for you to get feedback on behaviours that were helpful. There is further information about this in the following section.  It might yet be appropriate to do a full session review at this early stage. However, it is certainly worth asking your mentee how they thought the session went. |

**2. Mentoring session review**

A review of how the session went, from both the mentee and the mentor. This is the opportunity for you to get feedback on behaviours that were helpful. If it’s not yet appropriate to discuss all these at this early stage, please be sure to do so sometime before the mid-point in the programme and adjust your relationship/agreement accordingly.

Good session review questions:

* Did we achieve what we set out to do today?
* How do you feel the session went?
* Was it helpful when I…..?
* What was the turning point for you?