**Mentor Meeting Checklist:**

**Prepare before the first meeting...**

* Exchange contact information and discuss best way to communicate (phone, email, in person)
* Review promotion & tenure criteria and policies for your mentee’s track and rank
* Obtain and review the mentee’s CV and IDP prior to first meeting
* Introduce yourself by phone or email. Suggest potential topics for first meeting and encourage mentee to prepare an agenda.

**During your meetings…**

* Set aside about an hour for the first meeting. Share professional and personal interests.
* Establish meeting guidelines. When and where to meet? How to schedule meetings? Communicating between meetings? Agenda format? Exchange of feedback and evaluation?
* Discuss expectations, roles, and responsibilities of the mentoring relationship. Provide articles, IDP, and other resources for the mentee to review or complete.
* To chart your mentee’s success, help develop a checklist that you both can follow.
* Partnership agreement, modify if needed and sign. Agree on confidentiality and no-fault termination.

**Meeting Structure for a 60 min meeting…**

* 10 minute: Check-in personal and professional updates. Review meeting agenda.
* 20 minutes: Address time sensitive issues (upcoming presentations, manuscript revisions, teaching dilemmas, etc…)
* 30 minutes: Assist with ongoing projects (goal setting, suggest resources, agree on timeline.) Provide career guidance for CV and Individual Development Plan IDP (current and long-term goals.) Consider networking opportunities and committee or professional organizations for mentee.
* Wrap up, clarify expectations, and schedule next meeting

Sources: Georgetown University Medical Center Faculty Mentoring Program *and* UCSF Faculty Mentoring Program