First Meeting: Mentee Checklist

**Before the Meeting**

____ Introduce yourself by phone or email and invite your mentor to a meeting.

____ Review mentor’s CV prior to the first meeting so that you are familiar with their academic background and scholarly work. Review the CV with an eye towards steps in mentor’s career path, and leadership and professional development activities that may be relevant to your goals.

____ Update your CV and send it to your mentor.

____ Complete (or familiarize yourself with) your Career Development Plan (CDP) questionnaire to discuss with your mentor. Consider:
  - What are my goals?
  - What skills do I need to learn or improve?
  - What do I want to improve or change about my work style?
  - How can a mentor assist me in meeting these goals?

**During the Meeting**

____ Set aside about an hour for the first meeting with your mentee. You may want to conduct the first meeting away from campus.

____ Agree on confidentiality and no-fault termination (see sample Faculty Mentoring Agreement under the Mentoring Basics tab).

____ Tell your mentor the best ways to contact you (e.g., email, telephone, text, best times to get in touch, etc.).

____ Request contact information from your mentor.

____ Discussion:
  - Decide how and when you will interact (for example meet in person quarterly, check in by e-mail monthly, contact by phone for time-sensitive issues or questions that come up).
• Decide main goals of mentoring relationship (for example a list of general topics that you want to cover over the year; designing your Career Development Plan; advice on course development, coaching on specific publications or grant proposals; etc.).

• Learn about other aspects of your mentor and share similar information about yourself if relevant (hobbies, sports, community involvement, family, settling in to Santa Barbara, non-work questions and challenges).

_____ Schedule your next meeting and agree on assignments, action items, or activities to be completed by mentor and mentee before the next meeting.