First Meeting: Mentor Checklist

**Before the Meeting**

____ Familiarize yourself with promotion/tenure policies and processes – campus and mentee’s division and department.

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

____ Review mentee’s CV prior to the first meeting so that you are familiar with their academic background and scholarly work.

**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 mentee the best ways to contact you (e.g., email, telephone, text, best times to get in touch, etc.).

____ Request contact information from your mentee.

____ 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 the mentee wants to cover over the year; designing the mentee’s Career Development Plan; advice on course development, coaching on specific publications or grant proposals; etc.).
  - Learn about other aspects of your mentee 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.