

Checklists



Checklists can be important tools to assure that important elements of the mentorship relationship are not overlooked and to remind us of the key elements in a meeting and the mentorship relationship that must be agreed upon and upheld. Following are 2 examples of checklists that might be useful. Others are likely available and may be more applicable or could be created that are specific to a mentorship team.

First Meeting Checklist

Get to Know Each Other

- Share information about your professional and personal life

- Learn something new about your mentee/mentor

Establish Guidelines

- When and where will we meet?

- How will we schedule meetings?

- How will we communicate between meetings?

- What agenda format will we use?

- Will there be any fixed agenda items to be discussed at every meeting?

- How will we exchange feedback?

- How will we measure success?

Partnership Agreement

- Review partnership agreement, modify if desired, sign and exchange

- Review goals for the mentoring relationship

Confirm Next Steps

- Schedule date, time and place of future meetings

Mentor's Meeting Checklist

Set aside adequate time for meetings

Obtain and review mentee's meeting materials prior to the meeting

Ask mentee for an agenda

Clarify meeting goals at outset

Review mentee's short/long term goals

Be sure that you have accurate, up-to-date information on advancement and promotion policies for your mentee's series and rank

Be aware of potential conflicts of interest if you are both a supervisor and mentor for the mentee

Be sure that mentee has joined committees and professional organizations helpful for career development

Assist your mentee to find other mentors within and outside UW if appropriate

Provide your mentee with opportunities locally, nationally and internationally that will advance their career development and satisfaction