



Long Term Mentoring Checklists

Before the Initial Meeting

The mentee checklist:

- Obtain your mentor's CV so that you can understand her or her career path, interests and professional roles
- Schedule one hour for the first meeting with your mentor to learn about other aspects of his or her personal/professional life. Share similar information about yourself.
- Complete an [Individual Development Plan \(IDP\)](#) to identify your developmental needs and goals and share with your mentor in advance

The mentor checklist:

- Obtain your mentee's CV and IDP so that you can understand her or her career path, interests and professional roles, developmental needs and goals
- Commit one hour for the first meeting with your mentee to learn about other aspects of his or her personal/professional life. Share similar information about yourself.
- Familiarize yourself with the promotion/tenure policies of your mentee's institution



Long Term Mentoring Checklists

The Initial Meeting

The mentee checklist:

- Discuss your needs with your mentor. Work with your mentor on measurable goals for the relationship with timeframes.
- Set goals, responsibilities of both mentee and mentor, and agree upon methods of communication and frequency of meetings.
- Document what has been discussed and agreed upon using a [Mentoring Agreement](#).

The mentor checklist:

- Review the [Individual Development Plan \(IDP\)](#) with your mentee.
- Set goals, responsibilities for both mentee and mentor, and agree upon methods of communication and frequency of meetings.
- Document what has been discussed and agreed upon using a [Mentoring Agreement](#)



Long Term Mentoring Checklists

Ongoing Mentoring Meetings

- Once the establishment of a long-term mentoring relationship has been agreed upon, use the following checklist to structure future ongoing meetings.
- Commit one hour for the mentoring meeting.
- Begin with a 'Check-In' – share how things are going for both of you personally and professionally, successes to celebrate, or challenges encountered.
- Review [Mentoring Agreement](#) to check status of achievement towards reaching agreed upon goals.
- Review past meeting [Mentoring Progress Report\(s\)](#) to check status of action items from previous meetings.
- Identify any new developmental needs of mentee and/or goals of mentoring relationship and amend Mentoring Agreement accordingly
- Develop new action items, including short-term and long-term, with specific deadlines
- Agree upon and record next meeting date, time and location.
- Complete new [Mentoring Progress Report](#)



Long Term Mentoring Checklists

Suggested Questions to Guide Discussion

Below are examples of questions to guide the discussion between the mentor and mentee as needed.

1. Tell me about your career path and why you have chosen to do what you do.

This question is meant to help your mentee clarify and articulate their sense of purpose: what drives them to do the work that they do.

2. Where do you want to go from here?

This question is intended to get the mentee to articulate their ultimate goal or aspirations.

3. What are you currently doing well that's helping you get there?

This question aims to help the mentee identify his or her strengths.

4. What are you not doing well that's preventing you from getting there?

This question aims to help the mentee identify his or her challenges and potential barriers, both internal and external.

5. What can you do differently to overcome those challenges?

This question focuses on assisting the mentee to prioritize and identify what changes must be made to achieve his or her goals.

6. What specific assistance or resources can I help you to obtain?

This question ensures that the mentor's skills, expertise and resources best align with the needs of the mentee.

Adapted from:

<https://www.micromentor.org/blog/questions-maximize-first-mentoring-conversation/>

<https://faculty.medicine.iu.edu/let-us-help/mentoring/mentoring-toolkit/>