

INITIAL MEETING CHECKLIST

The first meeting between you and your Mentee/Mentor will allow you to meet, get some background information and an understanding of your Mentee/Mentor's knowledge and experience. This initial meeting will allow you to set some goals and expectations for your mentoring relationship. In particular you will co-create a Mentorship Agreement to be signed by both Mentor and Mentee. Here is a general guide of what could be discussed in this meeting:

Background

- Discuss why you both joined the program.
- Discuss general background and experience with community leagues.
- Identify mentee's questions and current struggles.
- Discuss mentor's background and expertise and which of the mentee's goals they are best equipped to assist with.

Setting Goals

- Refine mentee's goals and discuss which goals you can work towards together and the required first steps.
- Determine the focus of your next meeting.
- Determine meeting specifics.
- Decide upon the meeting length (e.g. 1 hour) and frequency (e.g. a couple meetings, every 3 months, bi-weekly emails, every-other month in-person).
- Decide upon a meeting location (in person, video conferencing like Zoom, Google Hangouts, or Skype, or over the phone) *EFCL always recommends meeting in a neutral location or at a league rather than in someone's home.
- Decide the preferred method of communication (e.g. email, phone, text)

Discussing Boundaries

- Discuss any boundaries either person has around communication (e.g. will you provide your personal email or your work email? Are you comfortable meeting in person, or would you rather just meet online?)
- Discuss a plan if the mentorship relationship has to terminate sooner than anticipated or change.
- Discuss a plan to maintain a productive and healthy mentorship relationship.
- Discuss and come to an agreement upon the expectations from the mentorship.
- Discuss the confidentiality and privacy in the mentorship relationship.



Completion Plan

- Discuss an end date (approximate or definite).
- Review the EFCL completion procedure.
- Discuss what on-going support and resources they may need after the mentorship.

Mentorship Agreement

- Fill out the mentorship agreement, and make sure both Mentor and Mentee get a copy.

Wrap Up

- Express appreciation.

Follow Up

- Follow up promptly on any commitments you've made to each other. Mentees should take responsibility for setting up subsequent meetings, but mentors, if you do not hear from your mentee within a few weeks, please reach out to ensure that the relationship retains momentum.

Conversation Starters

- Common interests and hobbies.
- Personal accomplishments.
- Interesting things happening at your Community League.

ACTION STEPS

1. Sign the Code of Conduct and submit it to the EFCL.
2. Fill out and sign the Mentorship Agreement.
3. Decide the next meeting date.

