

Your First Meeting Agenda Template

The following is a sample agenda for your first meeting. Regardless of whether you follow this agenda, please ensure that you discuss the mentee's goals and history, and exchange expectations for what you hope to gain from the mentoring relationship. *Please note approximate times are for your reference only. Depending on your conversation each section may take more or less time.*

	Mentees	Mentors
Introduction and CV Exchange (approximately 15 min)	Share your professional experiences and academic background.	Share your experiences, especially those relevant to your mentee's experiences and aspirations.
Review Goals (approximately 15 min)	Share goals for your professional development and mentoring relationship.	Reflect on which goals you're best positioned to assist with, and in which ways. Let your mentee know which you cannot help with, and point them towards alternative resources, if possible.
Refine Goals and Develop Strategies (approximately 15 min)	Discuss with your mentor which goals you can work towards together, and the required first steps. Determine the focus of your next meeting.	With your mentee, choose a few goals and first steps.
Establish Meeting Times (approximately 10 min)	Discuss times, dates, and places for meetings. Plan to meet for 60 minutes, at least once a month. <i>APEGBC recommends that you meet a minimum of 4 times in the year.</i>	Discuss with your mentee your preferences for between-meeting contact (e-mail, office visits, etc) as well as your availability. Ask them about their constraints; do not assume that they do not have preferences.
Wrap Up (approximately 5 min)	Express appreciation! Thank your mentor for his or her time and effort. Recap what you'll be doing to follow up, and what you'll be discussing at your next meeting.	Review and confirm any commitments you've made to your mentee.



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Follow-Up and Subsequent Meetings

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.

At each meeting, review progress against your mentee's career goals. It is best to do this at the beginning of each meeting.

Please use the meeting minute's template to capture any action items that may come from your first meeting.