

Guide for Mentorship Meetings and Report Template

Introduction

Check-in meetings are an excellent way to monitor how your mentee is doing, and to reserve uninterrupted time for learning opportunities and professional development. If you're a mentor, you can follow this guide to help make the most of these meetings.

Throughout the course of the mentorship, the structure and focus of your meetings will change. In the beginning, you'll still be getting to know one another and determining the mentee's needs. After a few months, your focus will likely shift to the mentee's personal and professional growth. After about six months, you can open a discussion on the most beneficial path forward for your mentee.

Below you'll find suggestions on how to facilitate success for your mentee. Every mentor/mentee relationship will be different, but these guidelines can help you focus your goals.

GENERAL MEETING TIPS

- Schedule regular meetings. For the first month, it's best to meet at least once per week. Discuss how long meetings need to be to make progress without interfering with work schedules and other commitments.
- Build trust with your mentee during these meetings. Discuss how trust is built into your workplace culture, and give your mentee the opportunity to get to know you and ask questions.
- Periodically review how the mentoring process is going. The focus of your meetings will evolve based on the mentee's needs, but it's a good idea to let them share any changes they'd like to see based on their priorities.
- Celebrate your mentee's achievements and successes regularly.

Both of you can use this template to stay organized during meetings (some of these steps will only occur on a periodic basis and may not be necessary in every meeting):

- Help your mentee define their goals.
- Help your mentee organize their priorities and manage their capacity.
- Work with your mentee to create an action plan for their employment, and regularly adjust this plan based on their priorities.
- Take the opportunity to coach your mentee through any obstacles they're facing and discuss strategies to overcome them. You might be able to see a solution that is not as obvious to them.
- Leave the mentee with questions to ponder between meetings.

TIPS FOR THE FIRST MEETING

- Take the initiative and set up the first meeting. Invite the mentee to make notes on their career and mentorship goals and bring them along. They can share these with you at the start of the meeting.
- Get to know each other! Provide context on your responsibilities within the organization, and share your background and interests. Invite your mentee to share any information they want about their own life.
- Make note of the answers to these questions:
 - What are some concerns and challenges your mentee is facing?
 - What are their commitments in addition to this job (e.g., committees, childcare, classes)?
 - What does their past work experience look like?
 - What are their main employment goals? What do they hope to achieve in this role?
 - What kind of guidance are they looking for from a mentor?
- Use these answers to create an Individual Learning Plan for the mentee.
- Clarify what your role entails as a mentor. You are an advisor and guide—not necessarily a supervisor or manager. Describe the ways you think you can enrich their experience in the organization.
- Make sure your mentee knows you may discuss the content of your meetings with supervisors or managers. If they would like something kept confidential, they can bring this to your attention—but remember, you should clarify with your mentee what can and cannot be stay confidential (for example, safety concerns must be reported).
- Ask the mentee to select topics for future meetings. For example: workplace culture coaching or an overview of career opportunities in tourism.
- Give them an outlet to reach you outside of meetings (e.g., emails, phone calls, texts).

TIPS FOR THE FINAL MEETING

- Return to the mentee’s career and mentorship notes to measure your accomplishments together during the mentorship.
- Ask the mentee if there were topics they didn’t get a chance to cover or need more information about. If so, offer ways the mentee could find out more about these topics.
- Discuss the mentee’s ongoing career and professional development plans.
- Help them to develop an action plan for the coming months. What do they hope to achieve in the future and how can they get there?
- Discuss whether the mentee wishes to continue the mentorship on an informal basis (with their employer’s consent).

MENTORSHIP MEETING REPORT

DATE: _____

Mentee's name	
Mentor's name	
Mentee's current development goals	
Main topics covered during meeting	

Mentee's progress since last meeting	
Additional notes from this meeting	
Action items from this meeting	

DATE OF NEXT SCHEDULED MEETING: _____