

## Our First Meeting: A Planning Worksheet

Before you undertake anything significant in your life that's new, it can be helpful to take a few minutes to do some planning.

Planning is just a way to get clear on what you hope to accomplish — the 'end' — and then to lay out some logical steps to help get you there — the 'means.' This worksheet walks you through some common sense steps to plan a first meeting with your mentee..

### Basic Background Information

---

(Make sure you have all the information filled in below)

My mentee's name is:

---

Nickname (if any)

---

Phone number(s)

---

Email address

---

## Thinking Through the First Meeting

Typically, first meetings allow two people to get to know a little bit about each other, attach a face to a name and gain a bit of comfort. To do so, you need to think about what setting would feel comfortable for both of you, and plan out some conversation starters — knowing that these are tools if you need them, not a formula.

*(1) WHERE MIGHT I MEET WITH MY MENTEE WHERE WE BOTH WOULD FEEL COMFORTABLE?*

*(2) WHAT ARE SOME THINGS I COULD TELL MY MENTEE ABOUT MYSELF THAT WOULD HELP US GET TO KNOW EACH OTHER A LITTLE BIT? WHAT ABOUT ME AND MY LIFE STORY MIGHT BE INTERESTING AND RELEVANT TO THIS YOUNG PERSON?*

*(3) WHAT ARE SOME QUESTIONS I COULD ASK MY MENTEE TO GET TO KNOW HIM/HER A LITTLE BIT WITHOUT PRYING? (WRITE SOME POSSIBLE OPEN-ENDED QUESTIONS BELOW. NOTE: THESE ARE QUESTIONS THAT CANNOT BE ANSWERED WITH A 'YES' OR 'NO.')*

*(4) WHAT DO I WANT OUT OF THE MENTORING RELATIONSHIP — WHAT ARE MY HOPES?*

*(5) HOW CAN I FIND OUT WHAT MY MENTEE HOPES TO GET OUT OF THE RELATIONSHIP — WHAT QUESTIONS MIGHT I ASK?*

We recommend you look over your answers to this planning sheet shortly before your first meeting with your mentee. You might even bring it along to offer it as a bit of a roadmap for you both to follow.