Planning for the first meeting—a checklist

This checklist is for use when recruiting and planning initial meetings with your students. This worksheet may be modified to meet the specific needs of your unit.

___ Arrange first meeting with potential student.

___ Review the student’s current experience and background qualifications.

___ Explain the goals for meetings and discuss how confidentiality should be handled.

___ Discuss power relations and what each of you perceives as the boundaries of the relationship.

___ Discuss and record the student’s immediate and long-term goals:

   ▪ identify gaps and strengths in knowledge
   ▪ explore useful professional development experiences in light of these goals
   ▪ Record these on a professional development plan/timeline
   ▪ Discuss strategies and target dates

___ Discuss and record any issues that may affect the mentoring relationship such as time constraints and financial issues, lack of confidence, new to the role, availability of space.