

Mentor & Mentee Initial Meeting Guide

Instructions: Use this meeting guide and acknowledgement during your first meeting to clarify expectations, roles, and preferences. This helps ensure a productive and comfortable mentorship experience for the mentor and mentee

Mentee:

Today's date:

**Mentee residency/fellowship
program:**

Mentor:

Introduction

Share your background, interests, and current role

Mentor Initials: _____

Discuss your goals for participating in the mentorship program

Mentee Initials: _____

Expectations & Goals

What does each person hope to gain from this mentorship?

Mentor Initials: _____

Are there specific areas the mentee would like guidance on?
(e.g., academic career planning, research, teaching, leadership,
specialty-specific advice)

Mentee Initials: _____

Time Commitment

Discuss availability and preferred frequency of meetings (e.g.,
once or twice a year, quarterly check-ins)

Mentor Initials: _____

Confirm that the commitment is flexible and can be adjusted as
needed

Mentee Initials: _____

Meeting Format

Preferred method of communication for future meetings:

- In-person
- Virtual (Zoom, Teams, etc.)
- Email
- Phone
- Best days/times to meet or connect

Mentor Initials: _____

Mentee Initials: _____

Contact Information & Communication Preferences

Share preferred email addresses or phone numbers

Discuss response time expectations and boundaries (e.g., "I usually respond within 2–3 days", "Feel free to follow up if you don't hear back", or "I can respond before 12pm on...")

Mentor Initials: _____

Mentee Initials: _____

Confidentiality & Trust

Agree on maintaining confidentiality and creating a safe space for open discussion

Acknowledge that either party can revisit or adjust the mentorship arrangement at any time

Mentor Initials: _____

Mentee Initials: _____

Next Steps

- ☐ Schedule the next meeting or check-in
- ☐ Identify any follow-up items or resources to share
- ☐ Mentee: Submit this form to Office of Medical Pathways for internal record keeping

Mentor Initials: _____

Mentee Initials: _____