

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 'mean'. 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

Best time to call/contact

What would I like my mentee to call me?

Has my mentee been told who I am and that I will be calling?

___yes ___no ___don't know

If the answer is "no" or "don't know" and you are working through a formal program, please contact the program staff and find out the status of this step. Calling before your mentee has heard about you can make the first conversation awkward and confusing.