

SME Mentor Match - Defining the Relationship Worksheet

Thank you for taking the time to set your mentoring program up for success! Mentors and mentees will answer the below during their first meeting, based on the best plan for the pair.

Communicating

- Exchange contact information and best method and time to contact.

Meeting

1. How will you meet?
 - a. In-person
 - i. Are you attending the same conferences you could meet at?
 - ii. Do you live near one another?
 - b. Virtually
 - i. Video conferencing (Zoom, Teams)
 1. Who owns this technology? Free versions?
 - ii. Email
 - iii. Phone call
 - iv. Text
2. How often will you meet?
 - a. Monthly
 - b. As needed
 - c. Other
3. How long will your meetings be?
 - a. 1 hour
 - b. 30 minutes
 - c. As needed

Best Practices

- **Agendas** - Mentees will create an agenda for each meeting. Send the agenda to the mentor several days in advance, so they can review and be prepared to address the topics.
 - [See example agenda](#) in the Mentoring Community Library
- **Meeting Notes** – Mentees will write a summary of each meeting and submit to the mentor. This confirms both parties had the same experience in the meeting and the main points were conveyed/received. Include next steps, if appropriate.
- **Business hours** – Especially now, with so many working from home, business hours vary. Only contact your mentor during business hours, unless otherwise instructed. Take into consideration time zones when determining the best time to contact.