



## MENTORS: Discovery Call Outline

1. Welcome and Introductions
2. Describe How this Initial Discovery Call will go
  - a. The purpose is to get to know one another and to figure out if this is a good match to continue.
3. Mentee's Profile
  - a. Have the mentee touch on their education, work/volunteer experience and training.
  - b. What led the mentee to enroll in this program?
  - c. Have the mentee briefly describe his/her professional goals and needs.
  - d. What is the mentee looking for as success from the mentorship?
4. Mentor's Background
  - a. Touch on education, relevant work/volunteer experience, and training.
  - b. Explain how your work and experiences will be beneficial for the mentee and this relationship.
5. Mentor Match Structure
  - a. Explain that initiative and change always comes from the mentee.
  - b. Ask how the mentee wants to be mentored.
    - Will the mentor just respond to questions?
    - Ask questions of their own?
    - Proactively provide resources? Or wait to be asked?
6. Confirm Dates and Times of Monthly Meetings
  - a. Decide and agree on a preferred day of the week to communicate once a month that works for both you and the mentee.
  - b. Go through each of your calendars to plan ahead monthly calls.
  - c. Note the impact of vacations, appointments, and late/misssed calls.
    - Let each other know changes in scheduling that may arise at least 48 hours in advance.

## 7. Mentoring Program Forms

- a. Discuss mentee's initial worksheets regarding strengths, challenges and goals.
  - If mentee has yet to fill them out, have him/her send you them along with the first agenda (the initial worksheet is optional).
- b. Discuss mentee agenda expectations.
- c. Mentees have the responsibility of logging conversations and sharing notes with the mentor. Agree on how, when, and how often these notes are to be shared.

## 8. How Calls Will Go

- a. Establish preferred method of communication.
- b. Remind mentee that you are there to guide them.
- c. The mentee should respect the efforts and time you are putting into the mentorship.
- d. If the mentee needs something more or different than what you are providing, it is up to the mentee to respectfully bring up the concern.

## 9. Commitment

- a. Explain that learning and change take time.
- b. The objective of the mentorship is to move the mentee forward towards his/her goals and needs.

## 10. Thank Prospective Mentee

- a. **Determine whether you are a good match.**
- b. If so, schedule your first meeting.
- c. If not, wish each other the best of luck with future mentoring relationships.