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/missed 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.