

DISCOVERY CALL OUTLINE

(for Mentors)

1. Welcome and check-in
2. Get to know each other
 - Explain how the discovery call will go
 - At the end of the call, both you and the protégé can determine whether you are a good match and want to proceed with the mentorship
3. Protégé's bio
 - Have protégé briefly describe his/her professional goals and needs
 - What is the protégé looking for as success from the mentorship?
 - What led the protégé to consider this program?
4. Mentor's background
 - Touch on education, relevant work/volunteer experience, and training
 - Explain how your work and experiences will be beneficial for the protégé and this relationship
 - Explain what mentoring will look like – will the mentor just respond to questions? Ask questions of their own? Proactively provide resources? Or wait to be asked? Will mini assignments/research for protégé take place in-between meetings? How long will these assignments take? What is expected?
5. Confidentiality and security
6. How to design an alliance
 - Explain that initiative and change always comes from the protégé
 - Discuss boundaries and how protégé wants to be mentored
 - Expect mistakes to happen from both parties without judgement
7. Mentoring program forms
 - Discuss protégé's initial worksheets regarding strengths, challenges, and goals. If protégé has yet to fill them out, have him/her send you them along with the first agenda
 - Discuss protégé agenda expectations

- Protégés 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
- Preferred method of communication
 - Remind protégé that you are there to *guide*, *not* teach. The protégé should respect the effort and time you are putting into the mentorship. If the protégé needs something more or different than what you are providing, it is up to the protégé to respectfully bring up the concern
9. Firm dates and times
- Decide and agree on a consistent meeting schedule that works for both you and the protégé. SHAPE America recommends:
 - Email (once per week)
 - Skype (once every two or three weeks for 30 minutes to an hour)
 - Phone (once every two or three weeks for 30 minutes to an hour)
 - Texting (once per week)
 - Face-to-Face (once per month for an hour)
 - Note the impact of vacations, appointments, and late/missed calls. Let each other know changes in scheduling that may arise at least 48 hours ahead of time
10. Mutual agreement to continue program for allotted time
- SHAPE America recommends the mentorship run for 9 months
 - Decide and agree on a preferred time that works for both you and the protégé
11. Commitment
- Explain that learning and change take time
 - The objective of the mentorship is to move the protégé forward towards his/her goals and needs
12. Thank prospective protégé
- Determine whether you are a good match. If so, schedule your first meeting. If not, wish each other best of luck with a future mentorship