

# Mentor Checklist **New Member:** \_\_\_\_\_

Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Date of assignment: \_\_\_\_\_ Date of New Member Induction: \_\_\_\_\_

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## **1. Prepare to meet New Member:**

- Phone New Member 5 days prior to induction
- Introduce yourself and your mentoring role
- Give date of New Member induction, location and time
- Establish location and time to meet prior to induction meeting

## **2. New Member Induction:**

- Meet and introduce to others before meeting
- Sit with New Member during meeting and be resource person
- Obtain best time to call to arrange First Mentoring Session.

## **3. Call to arrange First Mentoring Session:**

- Schedule a session during week following induction
- Remind New Member is to bring red New Member Packet
- Date: \_\_\_\_\_ Time: \_\_\_\_\_
- Session Location: \_\_\_\_\_

## **4. First Mentoring Session:**

- First half-hour—
  - Get to know each other:
  - Discuss family, work responsibilities, hobbies and other community service experience.
  - Get a sense of where the individual might be best suited in the Club's activities.
- Second half-hour—
  - Explain your role as mentor
  - Go over items in the New Member Packet and add following information:
    - Current copy of Club Newsletter
    - Club By-Laws and Policies
    - Club Member Roster or Directory
    - New Member Checklist
  - New Member should bring his/her Checklist to each Optimist function and update the key word list.
  - Encourage New Member to ask questions, give suggestions and participate in all Optimist activities.
  - Arrange to meet either before or after each Optimist event to update the Checklists and exchange information.

**5. On-going Mentoring Sessions:**

- Meet New Member at all meetings and regular Optimist events
- Introduce New Member to others in local organization
- Sit with New Member and encourage questions
- Review New Member Checklist at each session
- Answer any questions about items on Checklist
- Confirm information on New Member Checklist is correct and complete
- Introduce New Member to specific volunteer chairpersons when interest is expressed
- Be looking for new ideas and suggestions from New Member
- Encourage to attend 2 Optimist events, outside of regular meetings, during the 8 week program (e.g. Board meeting, project, fundraiser, Zone meeting)
- Always end session with expectation of meeting at next Optimist function or event

**6. Final Mentoring Session:**

- Call to arrange final Mentoring session for 8<sup>th</sup> week of Program
- Schedule separate from regular Optimist meeting
- Remind New Member to bring New Member Checklist
- Date: \_\_\_\_\_ Time: \_\_\_\_\_
- Session location: \_\_\_\_\_
- Final review of New Member Checklist
- Answer any remaining unanswered questions or “key words” from list
- New Member to choose committee or project to serve (if not done so already)
- Committee or Project: \_\_\_\_\_
- Encourage New Member to call on you as a source of information
- Congratulate New Member on participating and completing Mentor Program

**7. Certification of Completion:**

**I hereby certify that New Member \_\_\_\_\_  
has successfully completed the 8 week Mentor Program and is prepared to be a  
productive member of \_\_\_\_\_ (name of local organization) \_\_\_\_\_ and Optimist International.**

**Signature of Mentor: \_\_\_\_\_**

**Date of Completion: \_\_\_\_\_**

(Return completed checklist to OI Membership Chairperson)