

Mentor Follow-up Checklist

Date	Contact	Completed ✓
Within 5 days of assignment	<ul style="list-style-type: none"> Schedule time to contact new member, by phone, email or in person, if possible. Schedule follow up phone call for approximately 2 weeks later. <i>This would be a good time to review the OAMR Resource Guide.</i> 	
Anytime	<ul style="list-style-type: none"> Schedule Key dates on your calendar, and if your mentee uses Microsoft Outlook, add those dates on the mentee's schedule through an 'invite'. If your mentee is close enough to your location, invite them to your City hall to see your filing practices, archives facility, etc. Make sure to contact your mentee on a consistent basis, via email or phone, even if it's just to check in with them and see how they're doing. 	
January 1	<ul style="list-style-type: none"> Email or call mentee related to upcoming scholarship deadlines and answer any questions about the training/certification process. Encourage mentee to attend professional development classes. If election year, answer any questions on process and provide samples on that process or any other process (agenda or parliamentary procedures) the mentee requests assistance with. 	
February 1	<ul style="list-style-type: none"> Email or call mentee to check in about their mid year academy plans such as room sharing and carpooling. 	
May 1	<ul style="list-style-type: none"> If mentee is attending professional development classes in June, share personal experiences and offer any advice. 	
August 15	<ul style="list-style-type: none"> Give mentee conference information on appropriate dress, activities and schedule time to meet after mentee has arrived and settled at the conference. Answer any question on the organization. Plan to introduce mentees to board and other members at the conference. 	
During Conference	<ul style="list-style-type: none"> Meet with mentee after their arrival at registration desk or the night before if they arrive earlier. Leave a note at the registration desk with your room number, and cell phone number, so they contact you if they would like. If you can't be available at the registration desk or on their first day, find a conference greeter or another member of the committee that can look for them. Invite them personally to the Meet & Greet function, and plan 	

	<p>on introducing them to other members.</p> <ul style="list-style-type: none"> • Verify their understanding of the new recorder track educational sessions, or other sessions that are available, and answer questions. Go through the contents of their conference bag with them, to make sure they are comfortable with the schedule, or if they have any other questions. • Try to make your mentee feel comfortable and welcome during all conference events, and be sure to include them as much as possible. Spend 30 minutes with your mentee each day outside of conference activities, if at all possible. Invite them to sit with you at events; our goal is to extend our hospitality, and to get them involved in OAMR from the beginning! (See the Mentoring Guide for more tips.) • Encourage your mentee to join a committee and be active in OAMR. 	
October 15	<ul style="list-style-type: none"> • Follow up with mentee via phone call after conference to answer any questions and offer assistance for the coming year. <i>Other potential discussion points are included in the Mentoring Guide.</i> 	

*** The schedule is based on the calendar year but can be tailored to your scheduled term of mentorship.