Mentoring Programme

We would like to acknowledge the contribution made by the Coventry and Warwickshire CIPD Branch in creating and sharing this Mentoring Scheme.

West Yorkshire Branch
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Introduction

This pack has been produced to support Mentors and Mentees involved in the West Yorkshire CIPD Branch Mentoring Programme. It aims to be a simple, effective and comprehensive set of resources with which to support those taking on the role of Mentor and the Mentee and the Mentoring relationship.

The Pack gives guidelines that can be used to develop a relationship/partnership between Mentor and Mentee. It has been written from the both the Mentor’s and Mentees perspective, providing support and guidance to facilitate the Mentee’s personal and professional development.

Our thanks go to all the volunteers who have gave their time and efforts to make this programme a reality.
What is Mentoring?

Mentoring is a form of training, learning and development and an increasingly popular tool for supporting personal development.

Mentoring is a distinct activity, separate to coaching, which has become a widespread development tool. We all know of famous mentoring relationships. Ian Botham for example was mentored by Brian Close, Kevin Keegan by the great Bill Shankly. There are many business mentoring relationships, notably Chris Gent and Arun Sarin at Vodafone and there are many more examples from politics and other fields. This often leads to the popular belief that mentoring can only be carried out by the best in the field. To paraphrase Clutterbuck, who has written extensively on mentoring, anyone can be a mentor if they have something to pass on and the skills, time and commitment to do it.

There is some confusion about what exactly mentoring is and how it differs from coaching. Broadly speaking, CIPD defines coaching as ‘developing a person’s skills and knowledge so that their job performance improves, hopefully leading to the achievement of organisational objectives. It targets high performance and improvement at work, although it may also have an impact on an individual’s private life. It usually lasts for a short period and focuses on specific skills and goals.’

Traditionally, mentoring is the long term passing on of support, guidance and advice. In the workplace it has tended to describe a relationship in which a more experienced colleague uses their greater knowledge and understanding of the work or workplace to support the development of a more junior or inexperienced member of staff. It’s also a form of apprenticeship, whereby an inexperienced learner learns the ‘tricks of the trade’ from an experienced colleague, backed-up as in modern apprenticeship by offsite training.

Mentoring is used specifically and separately as a form of long term tailored development for the individual which brings benefits to the organisation. The characteristics of mentoring are:

- It is essentially a supportive form of development.
- It focuses on helping an individual manage their career and improve skills.
- Personal issues can be discussed more productively unlike in coaching where the emphasis is on performance at work.
- Mentoring activities have both organisational and individual goals.
- Ongoing relationship that can last for a long time.
- Can be more informal and meetings can take place as and when the mentored individual needs some guidance and/or support.
- More long term and takes a broader view of the person. Often known as the 'mentee' but the term client or mentored person can be used.
- Mentor usually passes on experience and is normally more senior.
- Agenda is set by the mentee with the mentor providing support and guidance to prepare them for future roles.
The benefits of Mentoring

Mentoring will have a clear and positive effect on the personal and professional development of the Mentee. It is also intended to benefit the Mentors and the organisations they work for.

Being involved as a Mentee you should expect to:

- Identify areas for development and improve self confidence
- Confront current situations and issues
- Lead the agenda
- Ask the questions you need answers to
- Be prepared to probe rather than accept the first answer

As a Mentee involvement will benefit you and your organisation as the project allows you the opportunity to:

- Increase your understanding about yourself and situations
- Develop and practise your listening skills
- Learn from your Mentor
- Improve job satisfaction, motivation and enhance peer recognition
- Encourage self-reflection and develop specific skills
- Develop a career plan

Your involvement as a Mentor supports a Mentee by:

- Giving them an insight into your work and career
- Assisting them with practical tips on planning a successful job search strategy
- Offering advice and guidance with their career thinking
- Developing understanding, skills and problem-solving support
- Encouraging reflection and recognise and celebrate effective practice
- Identifying areas for development and improve self confidence

As a Mentor involvement will benefit you and your organisation as the project allows you the opportunity to:

- Develop and practise coaching skills
- Demonstrate your commitment to equality and diversity
- Gain a real understanding of diversity issues facing HR
- Share the knowledge and experience gained
- Take part in an innovative project
- Improve job satisfaction, motivation and enhance peer recognition
- Encourage self-reflection and develop specific skills
The principles in Mentoring

The following principles underpin the project and the Mentoring scheme:

- There must be shared understanding of and agreement with the purposes of the Mentoring scheme
- The process has to be understood by all those taking part
- The Mentoring project is a constructive, developmental form of support – of mutual benefit to those taking part
- There will be adequate training, preparation and support for those taking part in the Mentoring scheme
- A clear understanding of and agreement on the level of confidentiality will be required within the Mentoring relationship
- Any written record produced should be appropriate to the needs of the Mentor and Mentee, and should be accessible to both parties
- The Mentoring scheme will reflect and promote a commitment to equal opportunities
- Open communication and consultation will occur throughout the implementation and management of the scheme
- The continuing development of the Mentoring scheme will require regular reviews of its operation
- Participants will create a time frame both for the frequency of meetings and for the duration of the relationship.
The Mentor’s role

The relationship between Mentor and Mentee is very much Mentee-centred – focusing on their professional and personal development. It may include the giving of advice, information, establishing facts, sign-posting, self-appraisal, etc. Whatever the techniques, the emphasis is on enabling and empowering the Mentee to take charge of their development and their environment.

To allow this transition the importance of interpersonal skills is essential. These skills include listening effectively, empathy, understanding a non-judgemental approach and the ability to facilitate through skilled questioning.

The role of the Mentor is to:

- Listen
- Question, to elicit facts
- Give information, knowledge about organisation/occupation and informal networks
- Give advice on career development
- Offer different perspectives
- Offer support and encouragement
- Draw on own experience when appropriate
- Confront and discuss current issues
- Take the lead and make decisions in the early stages of the relationship

And to encourage the Mentee to:

- Listen
- Clarify understanding
- Share thinking
- Review and reflect on oneself
- Change assumptions
- Consider different perspectives
- Develop and manage a career plan
- Take responsibility for their own development
- Make decisions to maximise the outcomes of the Mentoring relationship

The Mentee’s role

The relationship between Mentor and Mentee is very much Mentee-centred. The Mentee is expected to take ownership and drive the relationship, drawing on the Mentor’s knowledge and experience as required. The Mentee is expected to be open, honest and receiving to enable and empower the Mentor to talk openly and honestly in order to assist the Mentee to take charge of their development and their environment.
To allow this transition the importance of interpersonal skills is essential. These skills include effective verbal communication, listening, questioning and understanding in order to extract and use the required information from the Mentor.

The role of the Mentee is to:

- Communicate their circumstances clearly, concisely and honestly
- Question where they do not fully understand or comprehend
- Provide information, knowledge about organisation/occupation and career to aid their Mentor with the provision of advice and support
- Act upon advice on career development
- Accept differing perspectives
- Accept support and encouragement
- Provide own experience to aid discussions
- Take the lead, guide and make decisions – when the relationship is established.
The Mentoring relationship

The Mentoring relationship can be a very powerful positive experience. It enables and develops a greater sense of confidence, enhancing the professional and personal skills of both parties. To make sure the experience/relationship is a success, a number of factors need to be addressed.

Factors for success

There are a number of factors which will contribute towards a successful relationship between Mentor and Mentee:

- Clear guidelines for the roles and responsibilities of both parties
- Agreed and shared understanding of the nature and type of support
- Commitment towards the principles and values of the Mentoring scheme
- The skills of both the Mentor and Mentee
- Clear communication in both directions

Clear communication is the cornerstone on which all the other factors sit. It is through constructive and empathic dialogue the relationship can develop allowing both parties to bring forward their ideas, enter discussions and maintain professional development. It is within this environment both parties can flourish.

To allow clear communication we can consider activities, tasks, strategies and skills that can be utilised.

Activities

The following are only a suggestion of activities that Mentors and Mentees may take part in and are detailed in the flow chart within the Appendix:

- An initial contracting meeting
- Work shadowing
- Review discussions
- Making use of a learning log
- Building a portfolio or record of achievement
- Personal support
- Reviewing the relationship
- Ending the relationship
Tasks

The following are tasks which the Mentor may use to varying extents depending on the relationship and circumstances:

- Negotiating and agreeing
- Identifying needs
- Observing
- Recording
- Giving and receiving feedback
- Assessing
- Advising
- Informing
- Problem-solving
- Target-setting
- Clarification of strategies and actions
- Evaluating

The Mentee should ensure that they provide commitment to the following tasks:

- Identifying issues or situations
- Questioning
- Discussing
- Note taking
- Action planning
- Researching
- Task completion
- Evaluating
Selecting and using strategies for supporting the Mentee

There are different ways a Mentee can be supported, encouraged and given constructive feedback. With each strategy, it is important to be aware of its purpose, appropriateness, the likely impact and its value to the Mentee.

Strategies can include:

- Giving advice – offering the Mentee your opinion on the best course of action
- Giving information – giving information on a specific situation (e.g. contact for resource)
- Taking action in support – doing something on the Mentee’s behalf
- Observing and giving feedback – work shadowing and observation by either or both parties. Observation coupled with constructive feedback is a powerful learning tool
- Reviewing – reflection on experience can develop understanding allowing one to consider future needs, explore options and strategies

The selection of strategies can be guided by a number of factors, such as:

- Values and principles underpinning the Mentoring scheme – in this case, encouraging self sufficiency and empowerment
- Shared understanding between Mentee and Mentor of the purpose behind the Mentoring relationship
- Quality and level of the professional relationship
- Level of experience and need of the Mentee
- Level of Mentor’s own awareness and comfort with the Mentoring process

Mentoring is an empowering experience for the Mentee; it is therefore vital that the strategies chosen encourage the Mentee towards autonomy. The Mentee is expected to negotiate the forms of support needed at the initial contracting stage; by making use of processes that are self-helping such as learning logs, self review journals, reviewing meetings and feedback. The relationship can be used to develop skills for both parties and is dependent on clear communication. This all-important communication can benefit from analysing a number of key skills, active listening and questioning.

The skill of Active Listening

Active listening is the ability to listen and internalise what is being said; essentially listening and understanding. You can use your whole self to convey the message of an active listener involved in the discussion, showing interest, gaining trust and respect. This can be achieved by using verbal and non-verbal communication.

Non-verbal communication has more impact than words alone, so facial expression, eye contact, non-verbal prompts (e.g. head nodding) and body posture (leaning slightly towards the Mentee, showing interest) will contribute towards building upon the professional relationship and improving discussions.

Your surroundings can also be utilised to create a climate appropriate for discussion to occur. The aim is for a quiet, pleasant and relaxed environment with no physical barriers
(e.g. a desk between Mentor and Mentee) to be used to conduct the meeting in.

Within active listening, we can concentrate on two important aspects used within Mentoring these being:

1. **Being focused**: Keeping the Mentee focused on a specific discussion topic, keeping the conversation confined around one area. This is difficult as Mentees in the early stages of Mentoring tend to have many questions and move from one to the other without linking or having a structured approach.

2. **Using verbal prompts**: Using sounds or key words to encourage the Mentee to talk more, clarify a point or extend an idea, for example:
   
   - The use of expressions like ‘I see’ and Go on…’ and by using sounds like ‘Uh-huh’ and ‘Ye-e-s’.
   - Repetition of key words within a discussion e.g. If the Mentee says ‘I am really concerned…’ repeating ‘concerned?’ may prompt the Mentee to expand further and shows the Mentor is interested and concentrating on the Mentee. Likewise, this works vice versa.

There are of course barriers to active listening which anyone involved in Mentoring needs to be aware of. Awareness of these barriers will allow the Mentor to encourage, support, show interest and respect to the Mentee. Barriers to listening include:

- **Tuning in and out** – on average we think approximately four times faster than we speak, leading to listeners tuning out, using the space to address their own thoughts or concerns rather than staying tuned into the listener.

- **The glazed look** – there are times when an individual will concentrate on the speaker (Mentee) rather than on what is being said for whatever reason, bringing on that glazed look on the face of those listening, a look we all recognise.

- **Mentee-centred** – issues discussed are less important to the Mentee, our discussions should always work around the development of the Mentee and not the subject being discussed.

- **Becoming heated** – certain phrases, words and views may cause Mentors to feel as if they should dive in with their own opinions; resulting in the Mentee becoming irritated, upset and switching-off. It is OK to give your own view but remember the professional discussion is for the Mentee and it is their ‘arena’ with the Mentor’s primary task being that of the facilitator/listener.

- **Giving space** – during discussions the Mentee will have silences and spaces, which will vary in length. Try not to rush in and fill these, as we all have differing periods of reflection and thinking. It is important to allow the Mentee time to internalise their thoughts.
Using the art of questioning

Questioning, if used effectively, is a very useful and powerful tool. It allows the Mentee–Mentor relationship to develop, assisting the Mentor in understand the Mentee’s situation or dilemma, assisting the Mentee in exploring and understanding their experiences with the hope of formulating avenues and actions for the future. There are many reasons to ask questions, they may be:

- To satisfy curiosity
- To obtain or clarify information
- To assist in exploring an issue
- To look at possible alternatives
- To check understanding
- To challenge contradictions, views etc.
- To move the discussion forward
- To direct the discussion

With the effect questions have and their power, it is important to select those which are of greatest use. Questions can essentially be broken down into two types, closed or open questions.

1. Open Questions: These are questions which require more than just a ‘yes’ or ‘no’ response and usually begin with ‘How?’ ‘Where?’ ‘What?’ ‘Who?’. Questions beginning with these can be used to:

   - Gain information – ‘What happened as a result of…?’
   - Explore personal issues – ‘What is your view on…?’ ‘What are you expecting to achieve?’ ‘How are you feeling having…?’
   - Consider and explore avenues – ‘What are the possible options for…?’ ‘What may help when…?’ ‘How would you deal with…?’

2. Closed Questions: These are questions which evoke a ‘yes’ or ‘no’ response and in doing so narrow down the opportunity for the Mentee to expand, closing down the discussion e.g. ‘Do you…?’; ‘Did you…?’. Continual use of closed questions will restrict the discussion, resulting in the Mentee saying less and the Mentor asking more and more questions. The overall effect is poor communication and a difficult environment to work within. There are times when closed questions are useful. They can be used to summarise and confirm a discussion, bringing parties up to speed and to the same level e.g. ‘So, you are saying that you don’t have an issue with…?’.

Avoid asking multiple questions. These are a number of different questions asked within the same sentence. They are unclear, cause confusion and stop both parties from focusing on the meeting.
Preparing for the role of Mentor

Concerns

Mentors may have concerns, and it is reassuring to know that these concerns are also experienced by the Mentees. Some of these concerns may be:

- Will we get on?
- Will there be enough time for the meetings?
- What am I supposed to do?
- Will I be able to do this?
- Confidentiality?
- What if things go wrong? etc.

We can see that these concerns can apply to both parties. The Mentor and Mentee can start to look at these issues prior to the initial contracting meeting. Reviewing past experiences and looking at the expectations of the Mentoring programme can do this (see Appendix). This will allow you to prepare, share understanding and formulate any questions, which can be raised and answered both at this stage and at stages prior to the initial meeting. The reflection will also invite you to consider issues that may be important for the future success of the Mentoring relationship.

The initial contracting meeting

The initial meeting is very important. It will;

- Set the stage for the relationship
- Allow a forum in which to establish the parameters essential for the success of the Mentoring experience.

It is the time to set, clarify and agree issues;

- The purpose of the Mentoring scheme and your expectations of what you hope to get from the experience?
- The framework for the supporting activities – What and how will these be delivered? What preparation prior to the meetings is needed? Each other’s responsibilities?
- Issues around time – Frequency of meetings? How long will these meetings be?
- Review meetings – Important to review the aims, objectives and consider how the relationship is developing and changing.

At the end of discussions at the initial contracting meeting both parties need to reach a shared agreement that states clearly what each party expects to give and gain from the relationship. This agreement can be verbal or a simple written summary can be used. A written version may be clearer and more useful. An example of a Mentoring Contract can be found in the Appendix. Remember that this is a suggestion and both Mentee and Mentor may adopt another method as long as the basics are outlined.
The Mentor and Mentee may want to consider the following when looking at an agreement:

How might the agreement help?
Would the agreement be unhelpful? How would it be unhelpful?
How do you feel about setting up a Mentoring agreement?

**Mentor – Mentee meetings**

The meetings are the central function allowing discussion on experiences, giving and receiving feedback, exploration of issues and talking through options for future action and development. The Mentor acts as facilitator/enabler through skilful questioning, a non-directive, non-judgemental approach and the use of different strategies. All this needs to happen within an agreed framework around a clear purpose or purposes.

The main purposes of the meeting may include:

- Reviewing experience
- Giving feedback
- Identifying strengths and achievements
- Identifying weaknesses and areas for development
- Exploring options
- Teaching or coaching specific skills and techniques
- Engaging in discussions on professional issues
- Agreeing support needs
- Setting targets for future action

The emphasis on the purpose will vary both during the meeting and across the meetings and during contacts. The meetings are not the sole point of contact as individuals may use the telephone and e-mail for shorter types of contact.

**How can we ensure these meetings work?**

There are a number of important issues/factors which we can consider to make the meetings work, these are important for success.

**Issue 1. Structure, purpose, content and process.**

The meetings should have a clear structure and purpose with respect to content and time parameters. These need to be defined and agreed upon during the initial contracting meeting and recorded if required on the Mentoring agreement. Giving the meeting a clear structure and process will ensure the time is used effectively. Content of the meetings will normally follow a linear progression. Moving from, looking back at recent experience, then discussing present experience and finally discussing future options. These three areas are linked and follow on from each other systematically. You may only discuss the last two looking at present experience and discussing future options or even work from looking at options and then the present experience.

- Looking back at recent experience – How have things been going? What has worked well? What hasn’t worked?
Discussing present experience – What are your thoughts now, in the light of what’s been discussed and raised?
Discussing future options – exploring and agreeing goals for future action, discussing ways to meet the needs identified. Developing potential, clarifying and agreeing the support needed.

There are normally three key process stages within the review meetings:

1. Establishing the task and people parameters – developing trust, connecting with each other, setting the agenda and ground rules
2. Exploration and clarification – of issues raised, Mentee’s thoughts and feelings and the Mentor’s views
3. Identification and agreement – targets and tasks for future action for both parties

**Issue 2. The Mentor’s skill as a reviewer**

In order for the review meeting to work effectively the Mentor’s ability to use their skills appropriately is essential. The core skills will probably involve: displaying respect, understanding, empathy, the ability to clarify, active listening, questioning, focusing, delivering feedback, summarising, negotiating, solving problems, target setting and action planning.

Just by looking at the core skills, we can see that the position of the Mentor is very powerful. It is the Mentor’s ability in using these skills to empower the Mentee, that is the ‘magic’; moving the power base from themselves to the Mentee, allowing them to develop. The Mentor will draw on their expertise, experience, knowledge base, charisma and ability to assess the Mentee and situation.

**Issue 3. Feeding back to the Mentee**

Feeding back into the Mentoring process is essential for any review and is the core component to the development of the Mentee. There are many factors, which can disrupt the feedback (receiving and giving) process, and for that reason it is a challenge for both Mentee and Mentor.

We can try to support and make the process easier by considering 4 key steps.

Step 1. Trust and Respect – Before the feedback process even happens it is important that Mentee and Mentor develop their professional relationship. Part of this development will be to discuss issues around feeding back, what it involves and what both parties want from it.

Step 2. Quality of the information fed back – Base comments on quantifiable and reliable information.

Step 3. Two-way discussion – Make sure the discussion is a two-way dialogue, where both parties are involved and buy into the process. There needs to be an exchange of ideas, views and opinions from both.
Step 4. Constructive Outcomes – Feedback needs to search for ways forward, strategies and solutions to difficulties that arise moving the development and learning forward.

These Steps can be helped along if we are:

- **Specific** – feedback is useless unless it is based around specifics and clarity. Neither party will be able to move forward until they know what does or does not work well
- **Evidence based** – refer to materials which support the feedback
- **Parameter bound** – work within the agreed and negotiated agenda set prior to the review (initial ‘contracting’ meeting)
- **Realistic** – feedback on those aspects which can be changed or developed
- **Checking** – ask for views and comments on the focus of the feedback, allowing involvement and an ownership of the process. The Mentoring will work better if both parties feedback into the review
- **Honest** – be true to the agreed delivery of feedback, using sensitivity along with honesty to address issues

**Issue 4. Moving on**

A review and feedback session that is successful will lead to clear outcomes. These clear outcomes are identified areas of strength, achievement and clearly show how things have worked and why. From these, clear and well-defined ideas for progression can be formed.

Remember the Mentee-Mentor relationship also needs to be reviewed within the format as the needs and input of both parties change. The ever-changing relationship affects the dynamics and helps to assist both in keeping the meetings targeted but needs to be reviewed regularly.

The ‘Moving On’ stage will reach a natural finale at which point it will be time for the relationship/partnership to end. Hopefully this end will be at a stage when the Mentee has become an independent learner able to facilitate his or her own development without the aid of the Mentor.

For most parties there is a degree of sadness and regret at the ending of an effective relationship, even when both parties know that it has reached the end of its useful life. It is important that the relationship finishes on a positive note and celebrates success in the final review.
Mentoring materials for the Mentee

It is important to remember that the Mentee is responsible for their own growth therefore they need to be actively involved in the discussions that take place. They are taking control of their development by managing themselves, using the Mentors as facilitators. The Mentor has decided to accept responsibilities in contracting with the Mentee in a Mentoring relationship.

Therefore the Mentee has responsibilities to the Mentor and only by taking these on will the relationship work. The responsibility is one that is shared by both parties. It is the Mentee’s duty to input into the relationship building the Mentor’s involvement and commitment. As the Mentee, you can develop and support this relationship by:

- **Clarity** – clear communication of your needs and aspirations to and from the Mentor will make the meetings focused and both parties will know where they stand.
- **Networking** – use any contacts and confidential information sensibly, seeking permission from the Mentor when using their name or details
- **Taking action** – agreed tasks need to be completed within the negotiated time frames
- **Not making demands** – that burden the Mentor-Mentee relationship especially around the issues of time and networking
- **Remembering** – Mentoring is just as much your responsibility, it is a two-way process and you will get what you are prepared to put in

The Mentee can start to ask questions helping themselves to bring forward concerns, ideas, hopes, past experiences etc.

**Review meetings**

To make effective use of the review meetings the Mentee needs to prepare by reflecting on their past experiences this will develop understanding, allowing one to consider future needs, explore options and strategies with the Mentor’s input.

The Mentee can start this process by considering the following prefixes to sentences:

- I am experiencing difficulty with…
- In terms of support, I may need…
- I want to develop my skill(s) in… What would you suggest?
- Things that have gone well are…
- How can I find out more about…?
- I have appreciated your support and ideas on… etc.

The prefixes above are only limited examples and many more will come from your reflections and thoughts. One way to ensure you are able to reflect on clear issues is to use some form of learning log, journal or diary system.

A learning log/recording system allows the Mentee to self-review and it is through this process you learn, develop and more importantly take ownership of the process.
can then, reflect, recognise achievements, analyse practices and identify areas for development. Some of the common questions, which may be used to help the Mentee reflect, are:

- What have I achieved?
- What have been difficult areas when...?
- What analysis has come from?
- What have I learned from...?
- What do I need to change so I can...?
- What do I need to develop to allow me to...?

Things to include and remember when you use a learning log/recording system:

- Reflection and analysis – concentrate on key learning points
- Support and development needs – be specific
- Difficulties that were encountered and how they were resolved
- Identified strengths
- Achievements and successes
- The log is for your own development and needs only be shown to those who have contracted into the Mentoring programme with you

The Mentoring programme will only work if you are willing to buy into it. It is a two-way process and is there as a tool to support your development. You are equal partners in a relationship, which allows you access to professionals from the world of work. Using their skills, expertise and experience you can start to develop yourself.

The materials used within the Mentor section are just as useful to the Mentee. It is helpful to familiarise yourself with the Mentor materials to understand the process and demands.
Appendix

Mentee Process Flow Chart (1)
Mentor Process Flow Chart (1)
Mentee/Mentor Process Flow Chart (2)
Mentoring Relationship Contract
Mentoring Action Plan
Mentoring Review Form
Training Material
Mentee contacts CIPD

Details of mentoring programme, qualifying criteria, contact details, calendar and application form available online. Mentoring marketing events held every six months.

Mentee completes application form

Download form available online. Includes CIPD number, contact details and dates of availability. Mentee should describe in app form: the person they are looking for; and the issue/reason for a mentor. Option to include a CV.

Sends form to coordinator

Mentee completes and sends form to coordinator. Mentoring coordinator confirms receipt and date of review panel to mentee.

App form reviewed by coordinator/panel

Coordinator confirms name of mentor to mentee.

Panel convenes to consider: needs of mentee; functional expertise, knowledge, skills & experience of mentor; mentor commitments; and geography. Panel review app forms against available mentor profiles.

Initial matching process

Coordinator works alone or convenes panel (dependent on workload) to consider: intake numbers; availability of mentors; holidays etc.

Initial meeting

Scoping meeting held as per H&S guidance. Mentee and mentor agree if they want to proceed with mentoring relationship. Agree SMART objectives, schedule of meetings & formal contract.

Mentoring marketing events held every six months.
Mentor contacts CIPD

Mentor completes application / profile form

Sends form to coordinator

Form reviewed by coordinator / panel

Mentor attends organised training event

Initial matching process

Details of mentoring programme, qualifying criteria, contact details, calendar and profile form available online.
Mentoring marketing events held every six months.

Download form available online. Includes CIPD number, contact details, dates of availability, geography and tick box list of function / industry / sector (inc time / experience in each).

Mentor completes and returns form to coordinator. Mentoring coordinator confirms receipt and date of review panel to mentor.

Coordinator works alone or convenes panel (dependent on workload) to consider: intake numbers; availability of mentors; holidays etc.

Panel convenes and then shares provisional match info with mentor. Mentor decides if match appears suitable and they believe they can help.

Yes

No

Scoping meeting held as per H&S guidance. Mentee and mentor agree if they want to proceed with mentoring relationship. Agree SMART objectives, schedule of meetings and formal contract.

Initial meeting

Mentor contacts mentee

Coordinator confirms name of mentor to mentee

Mentor confirms accept match

Mentor Process (1)
Mentor support
Support includes:
- Biannual meeting
- Skills practise / surgery
- Peer review
- Q&A
- Guest speaker
- Knowledge sharing
- Accredited status?

Relationship concludes
Revisit initial matching process
Mentor and mentee complete separate evaluations which are reviewed by panel. Process updated as appropriate.

End of assignment evaluation

Mentee and Mentor Process (2)
Mentoring Contract

This contract forms the basic agreement and commitment to the Mentoring relationship.

It should be completed within the first or second meeting, a copy kept by both Mentee and Mentor and a copy returned to the Mentoring Co-ordinator at wyork@cipdbranch.co.uk

<table>
<thead>
<tr>
<th>Mentor Details</th>
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</thead>
<tbody>
<tr>
<td>Name</td>
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<tr>
<td>Agreed contact method</td>
</tr>
<tr>
<td>Tel number</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Agreed times for contact</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mentee Details</th>
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</thead>
<tbody>
<tr>
<td>Name</td>
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<tr>
<td>Agreed contact method</td>
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<tr>
<td>Tel number</td>
</tr>
<tr>
<td>Email</td>
</tr>
<tr>
<td>Agreed times for contact</td>
</tr>
</tbody>
</table>
## Agreed details of Mentoring Relationship

<table>
<thead>
<tr>
<th>Frequency of meetings</th>
<th></th>
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<tbody>
<tr>
<td>Duration of meetings</td>
<td></td>
</tr>
<tr>
<td>Venue for meetings</td>
<td></td>
</tr>
<tr>
<td>Cancellation procedure</td>
<td></td>
</tr>
<tr>
<td>Style of mentoring (in addition to info given in this pack)</td>
<td></td>
</tr>
<tr>
<td>Limits of the relationship / Personal boundaries</td>
<td></td>
</tr>
<tr>
<td>Any other information (incl medical, etc)</td>
<td></td>
</tr>
</tbody>
</table>

By signing this document I am committing to make the CIPD mentoring relationship and programme work in accordance to the training and documentation provided by the **West Yorkshire Branch**

### Mentee

Signed .................................................. Date ..................

Print Name ...........................................................

### Mentor

Signed .................................................. Date ..................

Print Name ...........................................................
Mentoring Action Plan

Name: ..............................................  Date: ..............................................

My goals for the next 6 months are:

My goals between now and the next meeting with my Mentor / Mentee are:

The practical steps to achieve these are:

<table>
<thead>
<tr>
<th>Action</th>
<th>By whom</th>
<th>By when</th>
</tr>
</thead>
</table>

How will I know when I have achieved my goal?

<table>
<thead>
<tr>
<th>Review Date</th>
<th>Comments on progress</th>
</tr>
</thead>
</table>


## Mentoring Review Form

<table>
<thead>
<tr>
<th>Name of Mentee</th>
<th></th>
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<tbody>
<tr>
<td>Name of Mentor</td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
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</tbody>
</table>

How are you getting on with your Mentee/ Mentor?

What are the good points / benefits from the meetings so far?

Are there any issues / problems regarding the mentoring relationship?
Have you agreed any targets / objectives? Please detail below.

What progress have you made towards your agreed targets / objectives?

How could the programme be improved?

Date and time of next review meeting:

Signed ..................................................  Date ......................

Print Name ..........................................................
Training Material - Contracts

During the initial meeting with your mentee, it is important to set some ground rules to which you are both happy to agree.

Topics to cover should include: -

- Confidentiality
- Frequency of meetings
- Duration of meetings
- Venue for meetings
- How you can contact each other between meetings
- Times that you are willing to be contacted
- What to do when you can’t make a meeting
- What style of mentoring is to be used; how challenging you are happy to get
- Limits of the relationship
- Personal boundaries
Training Material - Goal Setting

In order to achieve our goals, we often set them using the SMART criteria. Many of us are already familiar with these.

**S** – specific – goals should be set in terms that are precise and clear. What exactly do you want?

**M** – measurable – how will you know when progress has been made or you have reached your target?

**A** – achievable – ensure that goals are within your reach, even if they are a little stretching.

**R** – realistic – goals should be relevant to your work and life and should be realistic in terms of all your other commitments

**T** – time bound – goals should have an end date and even milestones along the way.

Another useful approach to setting goals is the POWER technique.

**P** – positive – set goals using positive terms and words. “I want to make progress with my qualification” rather than “I don’t want to keep procrastinating.”

**O** – ownership – consider what part of the goal is within the individual's control. There are some things we can do and some things we can only influence. “I want to stop people interrupting my work” may not be within their control, but “I can influence others to interrupt me less” is.

**W** – where, what, who, etc – this covers the actions to gain the goal and may include some SMART criteria.

**E** – ecology – this checks the individual’s buy in to the goal. Ask, “if you could have that tomorrow, would you take it?” If there is any hesitation before the “yes”, then check what the barriers are.

**R** – reality – this is about making achievement seem as real as possible and is done by getting the individual to visualise success. The more the end goal appears, the more likely it is to happen.
Training Material – Active Listening

One of the key skills of communication is the ability to listen and actually hear what someone is saying. How often do you think you have told someone something and that they have heard and they come back to you later and say they weren’t listening?

Do you ever get the feeling that someone isn’t really listening to you; they are just waiting for you to finish speaking so that they can have a go. This is called ‘me too’ listening and is not effective in the communication process, as a lot of things can get missed. Listening effectively doesn’t come naturally to everyone, but it is a skill that can be developed with practice.

Here are some things that will help the other person to know that you are listening properly.

- make appropriate eye contact
- nod you head
- make encouraging noises; “mm”
- help by making responses; “OK”, “I see”
- smile
- ask relevant questions
- check your understanding
- curb your interruptions
- avoid assumptions
- show a genuine interest
- put yourself in their shoes
- keep an open mind
- be patient

Also, we tend to listen at different levels. We start with plain ignoring where, in fact, we are not listening at all. The next level is superficial listening where we may be displaying some of the attributes of active listening, but actually not a lot is going in and if pushed we probably would not be able to repeat back what we had heard. The next level is listening for content. At this level we are actively taking on the facts that are being shared and could recall them if required. The last level is listening for meaning. At this level we are gathering data about people’s emotions, beliefs and values. For example, if when asked how long they have been in a job an individual says “too long!” this gives us an insight into how they feel as well as the fact that they have been there some time.

Listening effectively is one of the biggest compliments that you can give to a person. Think about times when you have felt really listened to or not listened to at all. How did that make you feel? To be a great communicator, you first have to learn to listen well.
Training Material – Questioning

An important skill in communicating well is the ability to ask the right questions. Questions break down into two broad categories. Open questions allow you to gain more information, whereas closed questions will generally just get you a ‘yes’ or ‘no’ answer.

Closed questions can be useful when you need to check facts or confirm information and details.

Open questions allow the responder to either give you lots of information or they cut quickly through to the fact that you need to know.

They usually begin with the following words: -

- how
- who
- when
- where
- what
- why

Be careful when using ‘why’ as this can be perceived as quite challenging. For example, if you ask someone ‘why did you go there on holiday?’ they will feel that they have to justify their choice. If you ask, ‘how come you chose there?’ you are more likely to get an insight into their likes and dislikes.

There are some other tools that you can use to get people to speak freely. Try using TED and PIE.

T – tell me …
E – explain …
D – describe …

P – precisely
I – in detail
E – exactly

Also silence is very powerful at encouraging others to speak. It is particularly useful with people who are slower thinkers. However, keep an eye on the non-verbal communicators, as they will show when people are starting to get uncomfortable and it is time for you to speak again.
Training Material – Building Rapport

In order to communicate effectively with others, it really helps if you have rapport with them.

This means that you are ‘on the same wavelength’, that you just click with them.

Sometimes, we have natural rapport with people; think of your friends or partner.

Sometimes, we have to work on building it and there are a number of things that we can do.

When we communicate, any message is made up of three parts: -

- the words we use (verbal)
- how we say it, our tone of voice (vocal)
- what our body is doing, our body language (visual or non-verbal)

Research has shown that the greatest part of the message is passed on by our body language, then our tone and then the actual words themselves. Imagine asking someone how their day was and they reply with a one word answer, “fine.” If they said this through clenched teeth whilst slamming their keys on the table, this would have a very different meaning from someone saying it whilst nodding and smiling.

It is for this reason that a lot of rapport building is done around the non-verbal side of communication. If we watch others’ body language and listen to their tone of voice and aim to mirror this, we can start to build rapport. Watch people who are getting on well and see how they mirror or match each others body language.

Having said that, you can also build rapport by looking for common ground with someone;

- Do you support the same football team or enjoy the same hobby?
- Have you been on holiday to the same place?

Finding common links with someone will help you to build a good relationship with them which will allow for more effective communication.
Note down the key skills, qualities and attributes of an effective mentor.

Using personal reflection and feedback from others, rate yourself on how good you think you are in each area.

Consider where you would like to develop or make changes.

<table>
<thead>
<tr>
<th>Skills / qualities that would make me an effective mentor</th>
<th>How do I measure up?</th>
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<tbody>
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# Mentoring Training Evaluation

<table>
<thead>
<tr>
<th>Course Title:</th>
<th>Date:</th>
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<tbody>
<tr>
<td>Tutor(s) Name:</td>
<td>Your name:</td>
</tr>
</tbody>
</table>

## How would you rate the following:

1 = Needs Improvement  
5 = Excellent

<table>
<thead>
<tr>
<th>Your overall impression of the course</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>The effectiveness of this course in meeting your needs and objectives</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

## How would you rate the trainer in respect of:

1 = Needs Improvement  
5 = Excellent

<table>
<thead>
<tr>
<th>Their knowledge of the subject matter</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Their style &amp; delivery</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Their ability to relate to your needs</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Overall the pace of the course was:</th>
<th>Too Slow</th>
<th>Just Right</th>
<th>Too Fast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would you recommend this course to someone else</td>
<td>YES</td>
<td>NO</td>
<td></td>
</tr>
</tbody>
</table>
The most useful sessions were …

The least useful sessions were….

I feel confident using….

As a result of this development I will……

I’d also like to say (please add any additional comments here)…. 