



OA Society Mentoring Scheme: Information for Mentors and Mentees

Our Ethos

Mentoring is: *“helping and supporting people to manage their own learning in order to maximize their potential, develop their skills, improve their performance and become the person they want to be”* (Parsloe, 1992).

While many mentoring schemes involve written mentoring agreements or contracts which set out the rules of engagement and agenda issues, our scheme does not, as we don't want to be overly prescriptive and we feel that – as professionals – the mentors and mentees who participate should be able to discuss and agree key issues between them, with minimal intervention from the scheme facilitators. However, we have produced this information to provide a general framework, which is intended to help mentors and mentees, especially those who are new to mentoring.

Best Practice Guidelines for Successful Mentoring

- The mentoring partnership is entirely voluntary for both partners.
- Any matters discussed between the mentor and mentee should be treated as confidential.
- The mentor and mentee should respect each other's time and other responsibilities, ensuring that they do not impose beyond what is reasonable.
- Mentoring can be carried out face to face or by telephone or email. However there are limitations to telephone / email contact so it is recommended that the first meeting is face to face. Frequency and methods of communication should be mutually agreed, along with the means of contact between meetings for minor issues. Both mentor and mentee must be happy with the location of meetings giving due regard to safety, security, and travel arrangements.
- Mentor and mentee must also respect the position of third parties, such as line managers, or team colleagues.
- Both parties should take equal responsibility for progression of the mentoring partnership.
- The mentor and mentee should be open and truthful with each other about the relationship itself, reviewing from time to time how it might be made more effective.
- The mentee is not obliged to follow the mentor's advice; but the mentee does have a responsibility to consider the advice given in as open a manner as possible.
- The mentor will not intrude into areas the mentee wishes to keep “off limits” until invited to do so. However, they may help the mentee recognise how other issues relate to those off-limits areas.

- Both mentor and mentee must be volunteers; equally, either party may dissolve the relationship if they feel it is not working for them. However, they have a responsibility for discussing such a dissolution together, as part of mutual learning.
- Both mentor and mentee should share responsibility for the smooth winding down of the partnership once it has achieved its purpose. We have set an initial “default” time limit of twelve months for the mentoring relationships, but this can be extended by mutual agreement.

The Mentor’s Role and Responsibilities

The mentor’s role is to use their experience and maturity to help the mentee to gain a more rounded perspective of situations they face and decisions they have to take. The role of the mentor is varied and includes:

- encouraging the development of self awareness
- building confidence and motivation
- providing support and guidance based on your own experience
- help the mentee learn from mistakes and setbacks
- challenging assumptions and limiting beliefs and acting as a sounding board
- signposting the mentee onto other sources of information
- celebrating successes

Mentoring is most effective when it is non-directive: in other words, when the mentor uses open questions (simplistically, those requiring answers other than ‘yes’ or ‘no’) to encourage the client to think creatively and to form their own conclusions. However, experience is part of a mentors’ value, and there will be occasions when the mentor directly imparts information, opinion and experience.

Key mentoring skills

A good mentor:

- Is able to create rapport easily with their mentee
- Is conscious of their mentee’s circumstances, abilities and personal or professional challenges
- Listens actively
- Understands and follows the mentee’s agenda, not their own
- Asks open and reflective questions to encourage the mentee to really think about the issues they’re facing
- Constructively challenges limiting beliefs
- Allows the mentee to do most of the talking
- Challenges the mentee to think beyond immediate day-to-day issues
- Encourages the mentee to achieve specific goals
- Is accessible and flexible

- Sticks to agreed meeting times
- Is prepared to share their own ideas, thoughts and opinions but doesn't assume that their own experience is always relevant to the client.
- Doesn't criticise, but gives constructive feedback
- Is open to receiving constructive feedback on their performance as a mentor

From a legal liability perspective, the mentor should not provide consultancy or professional advice, and should ensure that no communication with the client, written or verbal, and nothing in their notes could be construed as such.

The Mentee's Role and Responsibilities

As a mentee, you are not a passive recipient of advice and guidance - you need to take an active role in managing the mentoring relationship and be responsible for your own personal and professional development. This involves identifying and articulating your learning needs and goals, setting the mentoring agenda and explaining to your mentor what you hope to get out of mentoring, and actively implementing the actions that you identify that will help you achieve your goals.

Be clear about what you want

You need to be very clear about what it is that you need and expect from your mentoring relationship. The more specific you can be, the more likely you are to benefit from having a mentor

Realistic expectations

It is important that you are clear about what you can reasonably expect from your mentor. Your mentor is there to help you explore issues in your work and career and to support you in identifying and acting on your own self-development, but it is not your mentor's responsibility to solve your problems for you or tell you what to do, though he or she may advise or make suggestions. It is your responsibility to formulate your own action plan with the help of your mentor and carry out the actions you have identified for yourself in order to achieve your goals.

Working with your mentor

Every mentoring relationship is different and is largely driven by the personalities, motivation, communication and learning styles of the people involved, as well as the type of issues that are discussed. As the relationship develops, you and your mentor will establish rapport and trust, and you will be able to openly discuss how things are working.

However, at the beginning of the relationship, it's important that you discuss your expectations of each other, and how you will manage your relationship together. This will help to avoid any misunderstanding or confusion in the future. In your initial discussions, you may disagree about your expectations of each other. This is all part of the process, so it's important not to be afraid to raise issues at the risk of offending your mentor. Provided you are realistic and respectful of each other, you can do this openly and honestly and the end result will be a good working relationship.

As the relationship progresses, your initial expectations and “ground rules” may change so you might want to revisit them throughout the relationship. You also need to recognise when the mentoring partnership, having achieved its planned objective/s, has reached its natural conclusion.

Learning Journal

You might find it useful to keep a “learning journal” of your mentoring sessions, summarising what you discussed, what you learned and what actions were agreed. This will help you keep a record of your progress and by writing it down and actively reflecting you will enhance your learning and achieve a better understanding of the issues you face.

The Mentoring Process

Initial contact

Before investing time and travel in a face-to-face meeting, mentor and mentee should have a telephone or email conversation to introduce themselves and make sure that expectations on each side are reasonable and attuned. It’s up to the mentee to take the initiative to make first contact.

The first meeting

The first meeting provides an opportunity for the mentor and mentee to get to know each other and to discuss the terms of the mentoring relationship. During this meeting:

- The mentor and mentee describe their background and experience.
- The mentee summarises their current situation, what motivated them to use mentoring, and explains the issues they would like to address.

Assuming that both parties are willing to continue, the following can be discussed:

- How you will communicate (see section on virtual mentoring, later)
- Duration and frequency of meetings (we recommend that the date of the next meeting is set at the current meeting)
- How long the mentoring relationship will continue (under our scheme it will initially be for twelve months, renewable by mutual consent).
- The boundaries of the relationship: additional support that the mentor is prepared to offer between meetings, such as phone or email conversations, contact details and reasonable expectations regarding contact
- Confidentiality

Following the first meeting, the mentor and mentee should confirm with each other that they wish the mentoring relationship will continue.

Suggested meeting format

As the mentoring relationship develops and you get to know each other better your sessions will become more and more natural, but to get you started, here's a suggested format for your meetings, which is akin to the GROW model:

1. Spend a few minutes "checking in" with each other and talking about normal everyday issues. This is to re-establish your rapport and help both of you feel at ease.
2. Agree the agenda for the meeting. Briefly discuss what issues to cover in the meeting and agree what you hope to gain from the meeting.
3. Explore the issues from the mentee's perspective. The mentor listens and questions to help the mentee clarify their current situation and explore / analyse the issues, challenges and feelings related to the situation.
4. Agree actions. Working together to come up with a list of possible actions and evaluating these, eventually agreeing what will be done, by when and by whom.
5. Wrap up. Summarise what has been discussed, the agreed actions and agree a date and time for the next meeting.

Virtual mentoring

Busy lives and geographical distances mean it's often difficult to meet face to face for mentoring meetings so while we do recommend the first meeting is done personally (this helps establish rapport and trust), there's no reason why you can't have a successful mentoring relationship online. Advantages of virtual mentoring include:

- Mentors have more "thinking time" to consider issues presented by the mentee, and to formulate their questions more precisely. At the same time, mentees have more time to consider their responses.
- The mentor can respond quickly to urgent enquiries
- Virtual conversations can be more frequent and progressive than intensive face to face meetings that happen a few weeks' apart. This can help to maintain momentum and the ongoing development of the relationship
- Some mentees may find it easier to be open about certain issues in an email than in a face-to-face meeting.

However, there are some things to consider: email can be very impersonal and the immediacy of face to face contact is absent – non verbal cues such as gestures, facial expressions and body language are missing. This makes it harder to establish and build rapport and to gauge people's feelings. You need to think carefully about what the "tone" of an email is saying as well as the words.

Preparation for meetings

It may be useful for the mentee to email the mentor a day or so in advance of meetings, saying what they have or have not done since the last meeting, any new issues that have arisen, and what they would like to discuss at the next meeting.