

DEVELOPING A MENTORING SCHEME.

Checklist 082

» INTRODUCTION

Mentoring is an increasingly common developmental approach which can produce excellent results for the mentor, the mentee and the organisation(s) both parties are affiliated with. Its popularity can perhaps be accounted for by virtue of it being a low-cost yet highly personalised approach to development. Mentoring demonstrates organisational commitment to the individual's development, but is not as directive as other developmental approaches such as training courses. The mentor is effectively a person who is not directly involved with the mentee's job role but is backed by the organisation to listen to, guide and advise the mentee, in full confidentiality.

Nevertheless, mentoring needs to be complemented by other forms of learning and development, rather than being seen as a 'cure-all' or 'quick fix' to training and development needs in an organisation. Unstructured or informal mentoring can be perceived as a form of patronage, or as giving the mentee an unfair advantage.

Mentoring should not be seen as an additional or supplementary management task, but as part of a style and approach to management which puts the mentee's development at the heart of the business process. The mentee is not the only one to benefit however – the mentor gets a chance to 'give something back' and to gain (additional) experience of motivating and advising others. The relationship between mentor and mentee can be informal, with the mentee leaning on the mentor for guidance, support, help and feedback. It can also be a more formal arrangement between two people who respect and trust each other, and who have organisational backing to develop the relationship and seek positive outcomes from it.

This checklist focuses on formal, organisational schemes and describes the issues to be considered and the steps involved in developing an organisational mentoring scheme. Our related checklist Mentoring in practice, provides more information on how mentoring schemes operate once they have been set up (See Additional resources below).

» DEFINITION

Mentoring is a form of employee development whereby a trusted and respected person - the mentor - uses their experience to offer guidance, encouragement, and support to another person - the mentee. The aim of mentoring is to facilitate the mentee's learning and development, to enable them to discover and develop their capability and potential, and ultimately to enhance their performance and realise their ambitions for the future. Mentoring can enable individuals to build their knowledge and understanding far more rapidly than everyday experience would typically allow.

While mentoring and coaching both involve conversations which aim to help individuals manage their own learning and development, many practitioners and theorists make a clear distinction between the two. Coaching is more likely to deal with specific tasks and skills that can be mastered and measured, while mentoring tends to focus on longer-term development or progress. Coaching is usually carried out by a line manager or a professional coach, while mentoring is almost always carried out of the line, often by a self-selected volunteer. Mentoring relationships may last for a set period of time or continue on an ongoing basis.

» ACTION CHECKLIST

1. Review organisational culture

For a mentoring scheme to be successful, a suitably supportive organisational culture needs to be in place. Check for:

- › a clear and accepted vision of where the organisation is going
- › encouragement of learning and development activities amongst staff
- › high levels of cooperation and support between functions and departments across the organisation
- › a climate of trust throughout the organisation.

The key to success is trust. If this is wanting, a programme of change may be needed before an organisation-wide mentoring scheme can be attempted with any hope of success.

2. Establish the goals of the scheme

Consider why you need to establish a mentoring scheme, and what you want to get out of it. Common reasons include:

- › improving and maintaining the skills and morale of staff
- › providing an additional source of guidance and support beyond that offered by line managers
- › enabling staff to realise ambitious career development plans
- › developing and retaining talent and skills, including developing management and leadership skills
- › improving internal communication.

3. Obtain the commitment of senior management

A mentoring scheme which does not enjoy the visible support of senior management will almost certainly fail. Without this support, employees will feel that the scheme is under-resourced, and that there is no authority behind it to support any recommended development activities. With senior management commitment, however, confidence will cascade down to mentors and mentees, who will be more likely to put their time, commitment and energy into the scheme.

In order to secure management commitment, think about the goals you have established. How do they link to the organisation's strategy? Could mentoring help to fulfil any key strategic goals? Senior management will want to see that mentoring will produce outcomes that are beneficial to the organisation and connect with its overall strategic vision and purpose.

Consider asking senior managers to participate as mentors or even to be mentored themselves.

4. Find a champion

Appoint a mentoring champion who is a senior member of the organisation (possibly the person selected to manage the scheme). Ensure that he or she is seen to be actively supportive on a day-to-day basis. This will be demonstrated through their:

- › help in developing the scheme
- › willingness to act as a mentor themselves
- › involvement with others participating in the scheme
- › commitment to training for those participating in the scheme.

5. Make sure the scheme is fully integrated

You don't want the scheme to be seen as someone's pet project. Make sure that it is integrated with other processes and projects that are undertaken by the organisation. For example, is successful participation in mentoring recognised by your performance management system? Is the mentoring scheme seen as a part of succession planning and leadership development? Make sure that the scheme complements any existing developmental opportunities, rather than acting as a stand-alone project.

6. Establish terms of reference

Establish who the scheme is aimed at. Is the scheme intended for a specific purpose e.g. to develop leadership skills, or to improve the retention and promotion of employees from a particular group or background? Make this clear so that both mentees and mentors understand whether it is appropriate for them to get involved.

Mentors need to be clear about their role and keep in mind that ownership of the mentoring process lies with the individual mentee. Mentors should take care not to offer anything which could be construed as legal advice and could render them liable should agreed courses of action not turn out as anticipated. They should also beware of allowing mentoring conversations to develop into counselling sessions which they are not personally competent or qualified to handle.

All discussions between the mentor and mentee should be strictly confidential. The only exception to this is if the mentee agrees that information can be relayed to a third party (for example the line manager).

7. Start small

Begin with a pilot scheme. It is impossible to guarantee that everything will work perfectly first time around. Testing will enable you to identify and address any problems and difficulties that may arise and to learn from mistakes. A pilot will confine blunders to a core group of volunteer mentors who have a strong personal interest in developing others. The result will be a more reliable, consistent and robust mentoring process in the long term.

8. Identify and train the mentors

Mentoring should be a voluntary activity, so issue a general invitation to staff to attract those who wish to become mentors. It is important, however, to establish a selection process to ensure a consistent standard amongst those who carry responsibility for mentoring others.

Training is important for mentors - they must be fully conversant with the mentoring scheme and what behaviours are or are not 'acceptable'. Mentors will need to have a clear understanding of:

- › the mentoring process
- › the difference between mentoring and directing

- › the boundaries of mentoring (for example psychological counselling goes beyond these boundaries)
- › the skills necessary for effective mentoring
- › the duration of the mentoring relationship (in instances where the mentoring is ongoing, it is best to establish this fact clearly at the start).

9. Identify problems in advance

Work out what you are going to do if and when there is:

- › conflict between the aims of the scheme and the 'hidden agendas' of participants
- › a breakdown of the relationship between mentor and mentee
- › disruption to development patterns through new tasks or responsibilities
- › obstructive behaviour on the part of the line manager.

10. Work out the logistics

Make sure you have arrangements in place for:

- › announcements, promotion and awareness raising – it is no good having an excellent programme in place if no-one knows about it
- › questions, problems and reassurances – some people may have queries or be reluctant to get involved; have answers to frequent questions ready so that you can reassure individuals or tackle any complaints
- › the technology and equipment needed if mentoring is to take place virtually?
- › the process of matching mentors to mentees – this will need to be fair and effective. Think about what to do if there is an imbalance between the numbers of mentees and mentors
- › proposing a framework for their first meeting – it is important for mentoring to get off to a good start. Clear messaging and a positive, encouraging initial presentation will facilitate this.

11. Establish evaluation procedures

Plan to review the scheme on an annual basis against:

- › the goals selected at the introduction of the scheme
- › the success or failure of mentoring relationships, identifying the reasons for either.

Make sure you include feedback from both mentors and mentees, as this will provide essential input for amending or improving the scheme. An effective mentoring approach should become, and be seen as, just part of the way the organisation does business, rather than a short-term initiative or project.



POTENTIAL PITFALLS

Managers should avoid:

- › making assumptions on the basis of early successes or failures - each mentee will have different obstacles to overcome
- › forgetting that all participants are volunteers – avoid overly-prescriptive and directive approaches

BOOKS

Everyone needs a mentor: fostering talent in your organisation 5th ed., David Clutterbuck
London: Chartered Institute of Personnel and Development, 2014

The complete guide to mentoring: how to design, implement and evaluate effective mentoring programmes, Hilarie Owen
London: Kogan Page, 2011
This book is available as an [e-book](#)

A practical guide to mentoring: using coaching and mentoring skills to help others achieve their goals, 5th ed., David Kay and Roger Hinds
Begbroke: How to Books, 2012

Mentoring pocketbook 3rd ed., Geof Alred and Bob Garvey
Alresford: Management Pocketbooks, 2010

Coaching and mentoring: practical conversations to improve learning, 2nd ed., Eric Parsloe and Melville Leedham
London: Kogan Page, 2009

Mentoring in action: a practical guide 2nd ed., David Megginson, David Clutterbuck, Bob Garvey, Paul Stokes and Ruth Garret-Harris
London: Kogan Page, 2006
This book is also available as an [e-book](#)

This is a selection of books available for loan to members from CMI's library. More information at: www.managers.org.uk/library

JOURNAL ARTICLES

Is mentoring the new black? Jenny Garrett
Training Journal, February 2014, pp 66-69

This article is available for members to download from CMI's library. More information at: www.managers.org.uk/library.

RELATED CHECKLISTS

- 053** Counselling your colleagues
- 083** Mentoring in practice
- 222** Giving feedback
- 224** Devising a coaching programme

INTERNET RESOURCES

Mentorsme www.mentorsme.co.uk
An online gateway for small and medium sized business mentoring

ORGANISATION

The European Mentoring and Coaching Council

PO Box 3154, Marlborough, Wiltshire, SN8 3WD

Tel: 0845 123 3720 Web: www.emccouncil.org



NATIONAL OCCUPATIONAL STANDARDS FOR MANAGEMENT & LEADERSHIP

This checklist has relevance for the following standards:

- › Unit DC2 Support individuals' learning and development
- › Unit DC3 Mentor individuals



MORE INFORMATION

e enquiries@managers.org.uk

t +44 (01536) 204222

w www.managers.org.uk

p Chartered Management Institute
Management House, Cottingham Rd, Corby, Northants, NN17 1TT

This publication is for general guidance only. The publisher and expert contributors disclaim all liability for any errors or omissions. You should make appropriate enquiries and seek appropriate advice before making any business, legal or other decisions.

Revised June 2014