



Mentoring Scheme 2021

Mentee Induction Pack

Do you think you could achieve more in your role or your career if you were guided and support by someone who has done what you want to do?

Could regular guidance and support from someone outside your organisation (so you can be more direct, open and specific about your challenges) help you get a different perspective on things and perhaps help you succeed quicker than you are now?

Having a mentor might enable you to do just that.

At its very basic core, mentoring is a relationship in which an individual supports another, by sharing their professional knowledge and experiences, and utilising key skills and personal attributes, to enable that person to achieve their goals.

The mentoring relationship is focused on enabling the mentee to:

- Progress in their professional life/career.
- Develop their skills, knowledge and capability.
- Facilitate their personal & professional development so that the mentee is able to fulfil their potential.

Mentoring isn't about giving advice, telling the mentee to 'do it the way the way I did it'. It's about motivating and empowering the other person to identify their own issues and goals. The aim is to help them find ways of resolving their issues, or reaching their goals, while understanding and respecting that the mentee may do things differently to the mentor.

Mentoring is not coaching, counselling or therapy - although the mentor may help the mentee to access more specialised support if it becomes apparent that this is needed.

Mentors cannot have, and are not expected to have, all the answers. To be effective, mentors need to encourage their mentee to come up with their own solutions and, if needed, seek advice from their line manager or colleague.

What's in it for me: the mentee

As well as benefiting from the experiences and knowledge of others, and the time and space to reflect on your current and future challenges and opportunities as a mentee you also benefit from the chance to:

- Get help with setting and achieving personal and professional goals and addressing challenges.
- Share ideas and consider new ways of doing things in a space away from your normal working environment.
- Discuss and receive encouragement to progress your career and develop new skills and knowledge.
- Gain independent feedback on your performance.
- Increase confidence and sense of value.
- Build a support network outside your team or work to draw on in the future.

Introduction

First of all, thank you for volunteering to take part as a mentor in the CIPFA mentoring scheme. We're really pleased to have you on board, and we hope that we'll be able to match you successfully with a suitable mentor.

We see this as a joint project, where we work with you to create the basis for a successful long-term mentoring programme, whilst giving you an opportunity to develop skills and experience that will also help you.

As a minimum, we ask that you commit to:

- An initial meeting with your mentor. Ideally this will be face-to-face (as research shows that this leads to the most successful mentoring relationships). However, we do understand that this may not be possible in all cases. The aim of the first meeting is to discuss ways of working, agree objectives and processes, and share your expectations of the mentoring relationship.
- Regular meetings thereafter, we recommend a minimum of once a month to enable you to build the relationship with your Mentee and create momentum.
- A final review/evaluation meeting with your mentee to check progress against objectives, give feedback on the experience, and conclude the relationship.
- Provide some feedback to the CIPFA region via an anonymous online survey so that we can review the scheme.

Mentee skills

Active listening

Listening is a core skill for being an effective mentor and mentee. How well you listen has a major impact on the quality of your relationship.

To improve your listening skills, practise active listening - making a conscious effort to hear the words and understand the meaning behind them.

Pay careful attention. Try not to become distracted, bored or lose focus.

It can be challenging to stay focused. You may be thinking ahead to your next question or topic of discussion for example.

If you're finding it difficult to focus or concentrate, try repeating the words mentally – this will reinforce their message and help you stay focused.

Your role as a mentee

It is your responsibility as the mentee to drive the mentoring partnership, to arrange meetings and ensure that the sessions with your mentor are helping you to meet your objectives.

A mentor is someone with knowledge and experience who can help challenge and guide you to achieve your goals and objectives. The mentor is there to guide and support you in your development, not there to solve your problems.

The key features of a CIPFA mentor are:

- Someone with extensive knowledge and experience
- Someone who can provide advice and support in building a profile and confidence
- Someone with an understanding of what's needed to develop professionally
- Someone who's prepared to devote time to the process

So, in a nutshell, a mentor is an advisor, a role model, a sounding board and perhaps a leader in their own area of expertise.

What next?

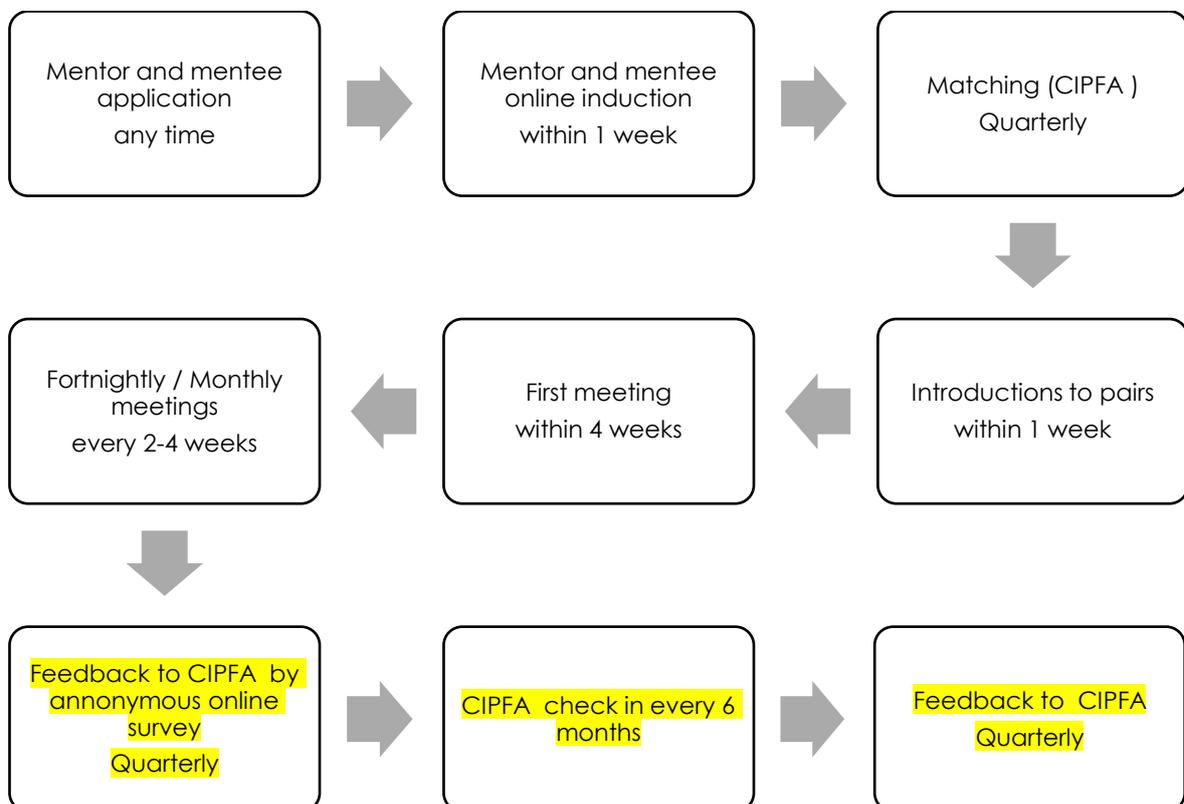
When we have someone, who is willing and able to become a mentee, we will set about matching them with someone who has offered to be a mentor.

Obviously, there are several factors to consider when matching a mentee to a mentor such as:

- Relevant experience of the mentor (if the mentee is seeking a mentor for a specific project or career step)
- Relevant skills

Mentors and mentees will most likely work in entirely different organisations which can be advantageous.

The mentoring timetable



Understanding your own objectives and development needs

You might find it helpful to carry out a SWOT analysis based on your objectives. Enclosed in your pack is a template for a SWOT analysis.

S trengths	Characteristics that give you an advantage
W eaknesses	Characteristics that might hold you back
O pportunities	What are they, and how can you find them?
T hreats	What are they, and how can you combat them?

Introductory Meeting

Based on the matching that CIPFA have made, you'll have the opportunity to have a no-commitment introductory meeting with your proposed mentor to see whether the match is suitable for an ongoing mentoring relationship.

Sometimes mentors and mentees may be inappropriately matched, and they do not establish rapport at the introductory meeting.

Although this may not necessarily be a negative – mentoring is after all about going outside our comfort zone into the learning / change zone – it may be either the mentor or mentee feel that it's unlikely for rapport to build and they would therefore like to explore finding another mentor/mentee.

If they wish, the proposed mentor / mentee could have a second introductory meeting just to see whether there is more rapport.

If this is the case, then the mentor and mentee can let CIPFA region know – and the reason why – so that CIPFA region can look for a more suitable match.

Please be aware that at the start of the scheme, the pool of mentors and mentees may be limited, so it may be a while before a suitable alternative is found.

First meeting

It is your responsibility as the mentee to make arrangements for the first meeting; ideally in a quiet and neutral venue.

Try to meet face-to-face, initially, as it'll increase your chances of building rapport and making the relationship a successful one.

We understand that in the current climate this may not be practical or possible.

The aim of the first meeting is to:

- Get to know each other
- Discuss your roles, careers and achievements
- Define your expectations and establish ground rules (confidentiality, scope etc)
- Discuss and agree the logistics
- Outline your developmental needs (using your SWOT analysis)
- Anything else

Do choose a venue that allows for an easy conversation – somewhere neutral, and not too noisy.

Mutual expectations:

- Agree what you both expect from each other e.g. you will be responsible for making arrangements for each meeting
- Review and discuss the roles and responsibilities of both mentor and mentee

Practical arrangements:

- Agree when the mentor relationship will start and how long it will last for. You can always decide to extend the relationship if you both wish, but it is best to set a finite time from the outset.
- Agree when you will review progress – depending on the reason for the mentoring relationship, this could take place after the first or second meeting or much later in the relationship.
- Agree how often and how long you'll meet for, and a regular meeting location that is convenient for both of you, including online if suitable.
- Discuss and agree whether the mentee can contact the mentor between meetings and, if so, what the circumstances for that might be e.g. to ask a particular question. It is a good idea to agree this initially and re-negotiate if it gets out of hand — which is unlikely if your other meetings are regular.

Confidentiality:

- In order to build an effective and trusting mentoring relationship, agree together that you will not disclose to anyone else what is discussed in the mentoring conversations unless otherwise agreed.

Review and evaluation:

- At the end of the arrangement, look back over the time and list what went well and
- What you might do differently another time. Comment constructively on each other's handling of the role.

It is important that, to get the most from your mentoring relationship, you have a clear understanding of what your objectives are. Without this, there is a risk that you won't gain as much from the programme as you could.

To help get some clarity around your objectives, it's helpful to use the SMART criteria:

S pecific	Target a specific area for development/action
M easurable	Quantify or at least suggest an indicator of progress
A ctionable	Specify what steps or measures can be taken
R ealistic	State what can realistically be achieved
T ime-related	Specify when the results can be achieved

Duty of Care & Confidentiality

What is Duty of Care?

Duty of Care is about individual wellbeing, welfare, compliance and good practice.

All workplaces, whether a school, a business, or a voluntary organisation have a moral and a legal obligation to ensure that everyone associated with the establishment, whether employee, volunteer, student, tradesperson or the general public, is fully protected from any personal physical and/or emotional harm, either on the premises or when engaged in activities relating to the establishment.

Typical areas of concern are fire safety, health and safety, food safety, personal safety, child and adult protection (plus wider safeguarding such as safer recruitment), equality, bullying, violence, harassment, stress, or discrimination from any source.

A breach of duty occurs when one person or an organisation has a duty of care toward another person or organisation but fails to live up to that standard. A person may be liable for negligence in a personal injury case if their breach of duty caused another person's injuries or mental ill health.

Your mentor you will have a Duty of Care to you. This will apply to:

- Where you meet – making sure it is a safe place
- Information you share with them

If at any time your mentor feels you are at risk as a result of what you share with them, either in your personal or professional life, then they will take appropriate action to alert the appropriate authorities in strictest confidence e.g. employer HR department, professional body, health service etc so that they can help and support you appropriately and take appropriate action to protect you.

They will not breach the Confidentiality you have in your mentoring sessions as any action they take in relation to the Duty of Care they have for you will be carried out on the understanding that any organisation they contact also has a policy of maintaining Confidentiality.

Subsequent meetings

It's incumbent on the mentee to drive the relationship and be in touch with you to arrange the meetings. Ideally, the meetings will be happening on roughly a monthly basis, either face-to-face or other means. Technology clearly allows for meaningful conversations to happen in other ways; and as with face-to-face meetings, preparation will be key.

Meetings should review any objectives or developmental needs established in the previous sessions. A template log-sheet has been supplied that can be completed by both mentor and mentee.

Mentoring challenges and how to deal with them

Relationships that don't gel

Not all mentoring partnerships work out. It's no one's fault, it's just the way it is. Any mentoring relationship should have a no-fault termination policy. You can ensure that this is less likely to happen by starting with an initial meeting to check the 'chemistry' is right before you begin your mentoring relationships.

This should include a frank and honest discussion about what you want and need, and how you see the role of mentor and mentee.

Unrealistic expectations

Mentees' expectations for their mentoring partners can be unrealistic. A mentor cannot and should not provide all the answers. Be flexible and discuss with your mentor where you could look for additional support if needed e.g. your line manager, a colleague, the Counselling Service.

If you experience any issues during the mentoring relationship, it's important to be open and honest with your mentor/mentee. Discuss what isn't working and try to reach an agreement as to how to resolve the issue and move forward. If you can't resolve the issue, you both need to agree to finish the relationship at that point and part on good terms.

Scheme feedback

CIPFA Mentoring Group will review how the scheme is going, identify opportunities etc. Therefore, mentors and mentees will be asked to complete an anonymous online survey every 3 months, and a named feedback every 6 months.

The CIPFA Regional Mentoring Group will then review the feedback, make recommendations and suggestions for any development opportunities, and report back to CIPFA Regional Council every 6 months. No names will be used in their report to Council.

Contact and queries

If you have any queries, concerns, or want to pass on any comments at any point during the programme, then please don't hesitate to contact us at cim@cipfa.org.uk

Enclosures

- Mentoring Charter
- SWOT analysis template
- Meeting log

Mentoring Scheme Charter

2021

1. To take part in the scheme prospective mentors and mentees will be asked to submit an application form. We will then engage in a selection and matching process which aims to identify and partner individuals effectively.
2. As part of the process, all participants will be invited to a short introduction session. Mentors and Mentees will also be provided with an outline of the mentoring process with guidance on how to manage and get the most out of it.
3. The scheme is a voluntary, consensual process which relies on the input of all the parties to make it work successfully. Once a mentoring arrangement is set up the onus will be on the mentee to arrange meetings and keep the process flowing.
4. The scheme will run for approximately 1 year, but some pairs may wish to continue beyond this point. After six months we will ask participants to feedback on their experience of the scheme so that we can evaluate it.
5. We are very hopeful that the scheme will select and match as many applicants as possible, however we cannot guarantee that all applicants will be offered a place as a mentor or mentee, or that suitable mentors or mentees will be found. In some cases, a mentoring relationship might need to be brought to an end: this can be done by either the mentor or mentee contacting us.
6. Any original work produced by a mentor or mentee remains the property of that mentor or mentee.
7. The information provided by you in connection with the mentoring scheme will be treated confidentially by us.
8. The mentoring scheme is a new initiative. Along the way some changes might need to be made to enhance the scheme and we will notify you of any key changes.
9. If you have any questions or issues with the mentoring scheme which you would like to discuss please contact: Email: cim@cipfa.or.guk

SWOT analysis

Name of mentee: -

Strengths	Weaknesses
Opportunities	Threats

Mentoring session log

Mentee and Mentor	Date of meeting
Topics discussed	
Learning conclusions/outcomes	
Suggested routes to achieve even better results next time	
Possible development needs	
Next steps (actions, project and development-related)	
Outcomes from these actions	

GDPR The Law

The General Data Protection Regulation (GDPR), which became effective on 25th May 2018, is all about putting the individual in control of the information (data) an organisation holds about them. The regulation has six guiding principles which organisations and their staff are required to abide by.

Personal data (that's anything that identifies an individual) should be:

1. processed lawfully, fairly and in a transparent manner
2. collected only for specified, explicit and legitimate purposes
3. adequate, relevant and limited to what is necessary in relation to the purposes
4. accurate and kept up to date; every reasonable step must be taken to ensure inaccurate data is erased or rectified without delay
5. kept in a form which permits identification of data subjects for no longer than is necessary for the purposes
6. processed in a manner that ensures appropriate security of the personal data

What it means to me And the CIPFA Mentoring Scheme

CIPFA commit to not holding centrally any data other than:

- Name
- Contact e-mail
- Organisation
- Job Title

The mentoring relationship is between the mentor and mentee, therefore they will each have:

- contact telephone number/s
- any other information provided by the mentor / mentee.

This will be shared on the understanding it is only used for the purposes of the mentoring programme, or when a mentee is deemed to be at risk. In these circumstances we may have to share your data with third parties. We require third parties to respect the security of your data and to treat it in accordance with the law.

Why might you share my personal information with third parties?

We will share your personal information with third parties where required by law and if your mentor believes you are at personal or professional risk.

How long will you keep my information for?

We will keep your information for the duration that you are on the Mentoring Scheme and for 1 calendar year thereafter.

Data management and non-disclosure agreement for volunteers

1. As a volunteer at CIPFA, I recognise that I owe a duty of confidentiality to CIPFA.
2. Certain personal, member and staff data is protected by law and volunteers should be aware of their obligations under data protection and other legislation. Information on the General Data Protection Regulations 2018 and the principles of best practice data management is available from the Information Commissioner's Office - <https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/>
3. I agree that all information, data and documents flagged as 'confidential' ("confidential material") or have access to, in connection with my service as a volunteer must be treated and kept as private. I will keep all such confidential material with strict confidence.
4. This Agreement covers confidential material in all formats, oral, written or electronic. It may include, for example, examples given by the mentor/mentee, or information received from outside bodies or members of the public.
5. I will not use confidential material for my own benefit, or allow anyone else to use confidential material.
6. Neither will I disclose or communicate the contents or existence of confidential material to anyone.
7. I will not share any personal data with third parties without the authorisation of ?. This includes details about my mentor.
8. The obligations I accept in this Agreement will apply at the time I am a Mentor/Mentee. After my involvement in the CIPFA Regional Mentoring Programme, I agree that I will continue to treat all confidential material acquired with strict confidence for as long as necessary to assure that confidentiality is not breached.
9. If I am uncertain about any aspect of the non-disclosure obligations I have accepted under this Agreement, I will seek guidance from CIPFA.
10. I accept that unauthorised breach of any of the obligations under this Agreement may be cause for ending my involvement in the Mentoring Scheme.

I have carefully read this Agreement before signing it.

Signed

Name (please print)

Date