



CIPFA in the Midlands Mentoring Scheme

Mentor Induction Pack

Updated April 2024

Would you like to inspire, guide and support someone in your field so that they reach their full potential?

Would you like to pass on the benefit of your knowledge, experience and leave a legacy where that benefits others beyond the life of your career?

Then becoming a mentor will enable you to do just that.

Introduction

First of all, thank you for volunteering to take part as a mentor in CIPFA in the Midlands 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 mentee.

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 mentee. 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 every two months 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 CIPFA in the Midlands so that we can review the scheme.

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

As well as benefiting from the opportunity to draw on your own experience and knowledge to help another individual grow and develop, as a mentor, you also benefit from the chance to:

- Develop valuable interpersonal and communication skills such as listening and questioning.
- Have the opportunity to 'give something back'.
- Share good practice from your own experience.
- Enable new colleagues to 'hit the ground running' and be as effective as possible in their role.
- Offer perspectives and insights into new or different ways of doing things.
- Learn from your mentee by gaining exposure to new ideas, approaches and perspectives.
- Give your mentee insight into processes and practices that you are familiar with.
- Gain recognition for your skills and experience and for your contribution as a mentor, raising your professional profile.
- Expand your network outside of your own team, department or institution.

Your role as a mentor

A mentor is someone with knowledge and experience who can help challenge and guide their mentee to achieve their goals and objectives.

Most of us have had someone during our careers who took an interest in our development, and who was, perhaps, a role model for our own development.

Mentoring on this programme is about supporting the mentee on their journey of discovery about themselves, their capabilities and in some cases, rediscovering their confidence – all with a focus on the mentee's career development.

The key features of a CIPFA Midlands mentor are:

- Someone with extensive knowledge and experience relevant to the mentee
- 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

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

Mentor 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.

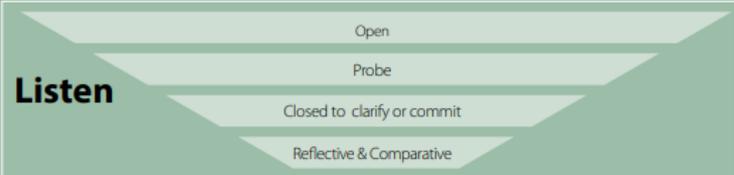
If you're finding it difficult to focus or concentrate, try repeating the words mentally – this will reinforce their message and help you stay focused.

It is important to also show true empathy and show a genuine interest.

Questioning skills: the funnel technique

Asking the right questions is another critical skill in the mentoring process.

The funnel technique involves starting with general questions, and then drilling down, asking for more detail each time.



Question types	Examples
Open: Framed to encourage a detailed response and prompt thought and reflection.	How have things been since we last met?
Probing: Help to get under the surface of an initial answer and bring out more detail, enabling the mentee to explore an issue in depth.	What was that like for you?
Closed: Framed to elicit a yes or no answer. They are used to clarify or to commit to something, or to check understanding.	My understanding is that...is that right? You are happy to agree to complete that objective before we next meet, yes?
Reflective: Repeat something the mentee has said or implied, enabling them to reflect on the impact of what they have said. Can provide new insights.	So you've told me that... It sounds like from what you have said that...
Comparative: A form of closed questions, providing the mentee with options to decide on the most suitable way forward.	Which would you say is more difficult to achieve?

The **Communication Essentials online course** has more about questioning

What next?

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

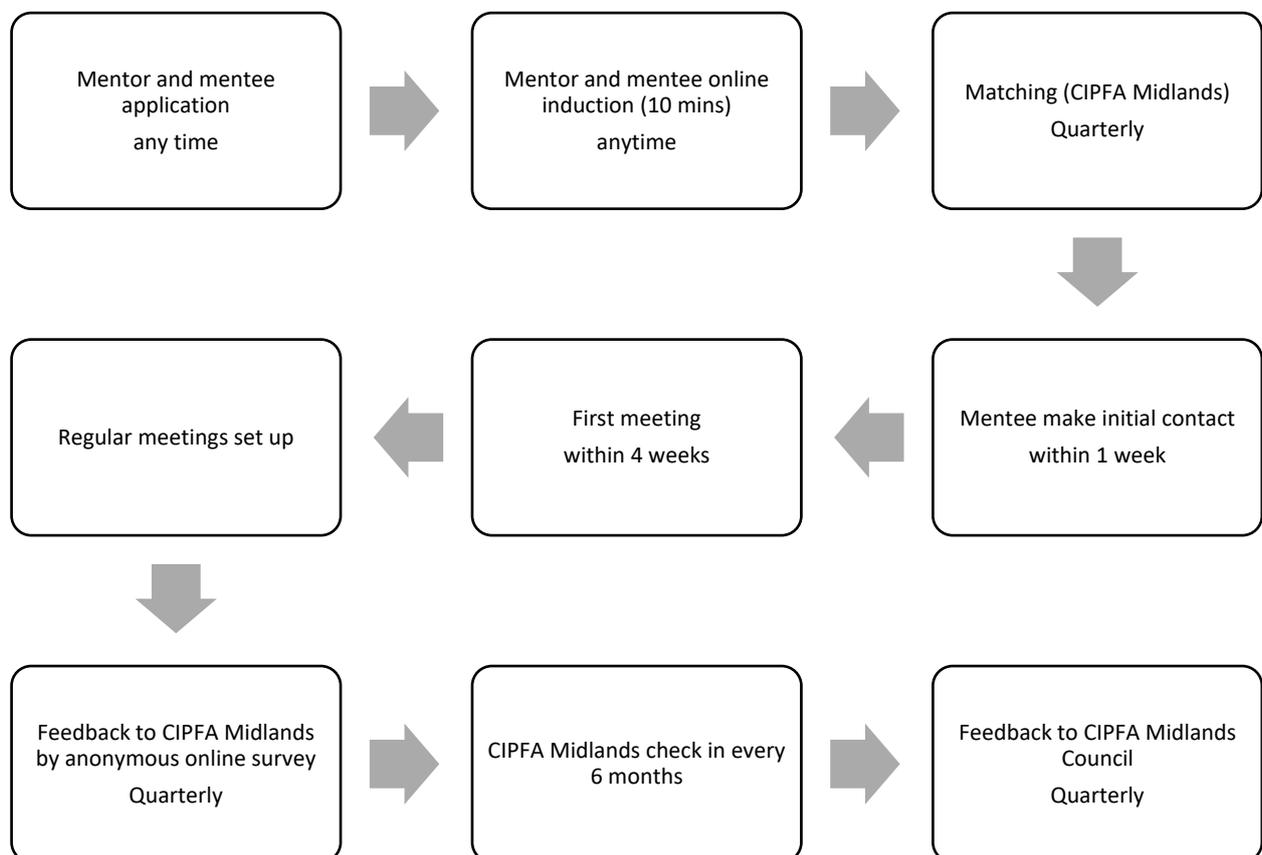
Obviously, there are several factors to consider when matching a mentee to a mentor such as:

- 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

Timescales below are indicative



Introductory Meeting

Based on the matching that CIPFA Midlands have made, you'll have the opportunity to have a no-commitment introductory meeting with your proposed mentee 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 Midlands know – and the reason why – so that CIPFA Midlands 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.

Getting the first meeting right

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

The aim of the first meeting is to:

- Get to know each other
- Discuss roles, careers and achievements
- Define expectations and establish ground rules (confidentiality, scope etc)
- Discuss and agree the logistics
- Outline developmental needs (mentees will have a template for a SWOT analysis)
- Let them know you have a Duty of Care for them (see page x for more details)
- 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. who will be responsible for arranging each meeting (this should be the mentee).
- 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

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 every other 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.

Support for you

CIPFA Midlands will be available to support you. In addition, we will be putting you in touch with other mentors who can be contacted about any queries or issues you may have in this mentor role.

Remember, as a mentor, it's not about you solving their problems, it's about you supporting them through their own.

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.

Equally, mentors should feel confident to say that they don't have the knowledge or experience to support the mentee with a particular issue.

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

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.

As a mentor you will have a Duty of Care to your Mentee. This will apply to:

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

At your initial meeting it is best to make them aware that you have a Duty of Care, and that if you feel they are at risk as a result of what they share with you, either in their personal or professional life, then you 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 them appropriately and take appropriate action to protect them.

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

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 for your mentee
- Meeting log

Mentoring Scheme Charter

2020

1. To take part in the scheme prospective mentors and mentees will be asked to submit a brief 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 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) 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 CIM Mentoring Scheme

CIM 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 Regulation 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") that I receive from CIM, or have access to, in connection with my service as a volunteer must be treated and kept as the private and privileged property of CIM. 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 CIM. This includes details about my mentor.
8. The obligations I accept in this Agreement will apply at the time I am a CIM Mentor/Mentee. After my involvement in the CIM 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 CIM.
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