GUIDANCE FOR MENTORING IN CHILDHOOD PRACTICE

CONTENTS

Appendix

FOREWORD

Having a confident, competent and valued workforce that can deliver excellent services for children and families in Scotland now and in the future, is essential. I want services to be dynamic, operating within learning organisations, with people who continuously develop their practice and deliver effective, early intervention to ensure improved outcomes for children.

This requires managers with professional skills, knowledge and understanding of working with children in these, their most formative years, and strong leadership skills. That is why we are asking all managers in day care of children services to extend their learning to SCQF level 9 in Childhood Practice.

I am pleased to note that many lead practitioners and managers across children's services have risen to the challenge. Some have already graduated with their BA in Childhood Practice. Many more are enrolled on courses across the country, demonstrating their commitment and passion and I am immensely proud of our children's workforce.

We must make best use of the knowledge, skills and understanding being gained by the workforce and create a workplace that actively encourages leadership to flourish and to support people to continuously learn and develop.

Effective mentoring can maximise the success of managers embarking on Childhood Practice learning. It can also support and encourage managers to lead and improve practice in their workplace. That is why the Scottish Government supported the development of this 'Mentoring in Childhood Practice' guidance. It has been created by the sector, for the sector and I am pleased that it can now be published.

I am confident this guidance will help employers and managers develop mentoring programmes that maximise the skills of our workforce and develop services that ensure children in Scotland get the best possible start in life.

Adam Ingram MP
Minister for Children and Young People

1

COALITION OF CHILDHOOD UMBRELLA ORGANISATIONS

Following the launch of the Childhood Practice Standard (December 2007) the Scottish Social Services Council (SSSC) set up the Childhood Practice Development Group (CPDG) to promote and encourage the development of Childhood Practice level 9 awards and to ensure pathways to awards are flexible and accessible to learners and employers in the sector.

Membership of the CPDG working groups draws together the breadth and range of professional expertise found in Childhood Practice and includes representatives from Scotland's learning institutions, national registration, inspection and advisory agencies and voluntary, private and public sector early years and childcare employers and umbrella organisations

In line with the Scottish Government's "Guidelines for Providers, their Partners and Learners enrolled on the programmes" (2008), early years and childcare umbrella organisations identified an additional challenge to both employers and employees working in community based (often smaller) childhood services. In these centres, it is recognised that access to appropriate support can be difficult to source which may create barriers to learning, the uptake of qualifications and to leadership development within the workforce.   To address this issue, a sub group drawn from the CPDG membership and representing the voluntary and private sector umbrella agencies was established as the Coalition of Childhood Umbrella Organisations (CCUO). Its priority was to:

"Establish nationally recognised mentoring guidance as an aid for employers and the umbrella organisations which support staff enrolled on programmes of learning leading to a Childhood Practice Award, through all its levels."

In partnership with University of Edinburgh 12 learners, each holding a leadership role within their respective area of expertise and representing all of the partners within the CCUO, undertook a bespoke level 10 course on mentoring in Childhood Practice. The outcomes of this learning and evaluation of their experiences have informed and shaped the guidance "Mentoring in Childhood Practice" (2010).

1. WHO IS THIS GUIDANCE FOR?

This guidance is designed to be adapted by employers, managers and staff who work in childhood practice and the wider social services. It is based on proven, research-based good practice and its aim is to promote good practice in mentoring programmes.

The mentoring model is not a one size fits all proposition: each organisation and the staff who work within it are different. However, there are elements which are common to all successful programmes. This guidance focuses on these common elements to help those developing and implementing mentoring programmes to achieve their goals at all stages of the process.

This guidance is designed to help an organisation's programme to reach its potential and in turn help to support the continuous professional development of its workforce.

Why mentoring?

The Childhood Practice workforce is currently undergoing significant transformation driven by a number of key national policies and demanding initiatives which aim to promote best outcomes for children and families.

The early years and childhood services sector is expected to develop the potential and increase the capacity of staff through a continual learning process. This complements the supportive work of the Continuous Learning Framework (CLF), a Scottish Social Services Council publication which helps social service organisations, including those in childhood practice, to support the workforce to be the best they can be.

The major policy documents driving this transformation include:
- The Standard for Childhood Practice (2007)
- The Early Years Framework (2008)
- The Curriculum for Excellence (CfE) (2005)
- Pre-birth to Three Years: Positive Outcomes for Scotland's Children (2010)
- Getting It Right for Every Child (GIRFEC) (2007)

Formal mentoring is a dynamic and effective tool for supporting such change and for enhancing professional learning and development.

With a focus on self-directed learning, mentoring offers individually tailored solutions to develop a more skilled, competent, confident and well-qualified workforce.

Organisations lacking the capacity, resources or the necessary skills to create an in-house mentoring scheme could consider partnership with other childhood practice organisations, national organisations, small community groups, networks or peer groups. Here are some examples of models.

Shared Partnership Model
Example of an organisational partnership model

Creates potential for buy in and building capacity in future

Communicates to Childhood Practice sector and other stakeholders in social services sector

Jointly agrees purpose and aims to establish agreed mentoring framework

Identifies potential mentors and mentees across their organisations

Manages programme and allocates resources

Appoints a Programme Co-ordinator

MENTORING CONSORTIUM

Reports to Consortium

feedback and evaluative reports

reach formal agreement

feedback on mentoring relationships within specified parameters

Identify need for mentoring programmes in their organisations

SPPA

CALA

NDNA

Monitors and evaluates

recruits, trains, matches and supports

mentees

mentors

mentoring relationships established

provides documentation

undertakes associated admin

manages resources

Confident, knowledgeable, motivated, professional workforce

4

Single Organisational Model

Example of how mentoring fits within a single organisation

Quality management, Continuous service evaluation

Line management & supervision

Staff support and development

Mentoring Programme Coordinator

Policies, procedures and training

Mentoring framework Mentoring function

Staff, Continuous professional development

Organisation, best quality care & education

Mentee induction Mentor selection & training

Continuous evaluation of staff

Increased ability to harness the child's own inquisitiveness: exciting programmes for children

Evaluation of mentoring relationships & scheme

Evaluation of impact of staff development on practice and service delivery

Confident, knowledgeable, motivated, professional workforce

5

Peer Group Model
Example of a peer group model

Family Support Worker, Childminders,
Out of school workers, Befrienders,
Learners, Sole daycare workers

Peer Mentoring

Confident, knowledgeable, motivated,
professional workforce

Guidance

Coordination

Infrastructure

Consultancy

Monitoring
and evaluation

Mentoring Consortium
or
Learning Provider
or
Umbrella Organisation

6
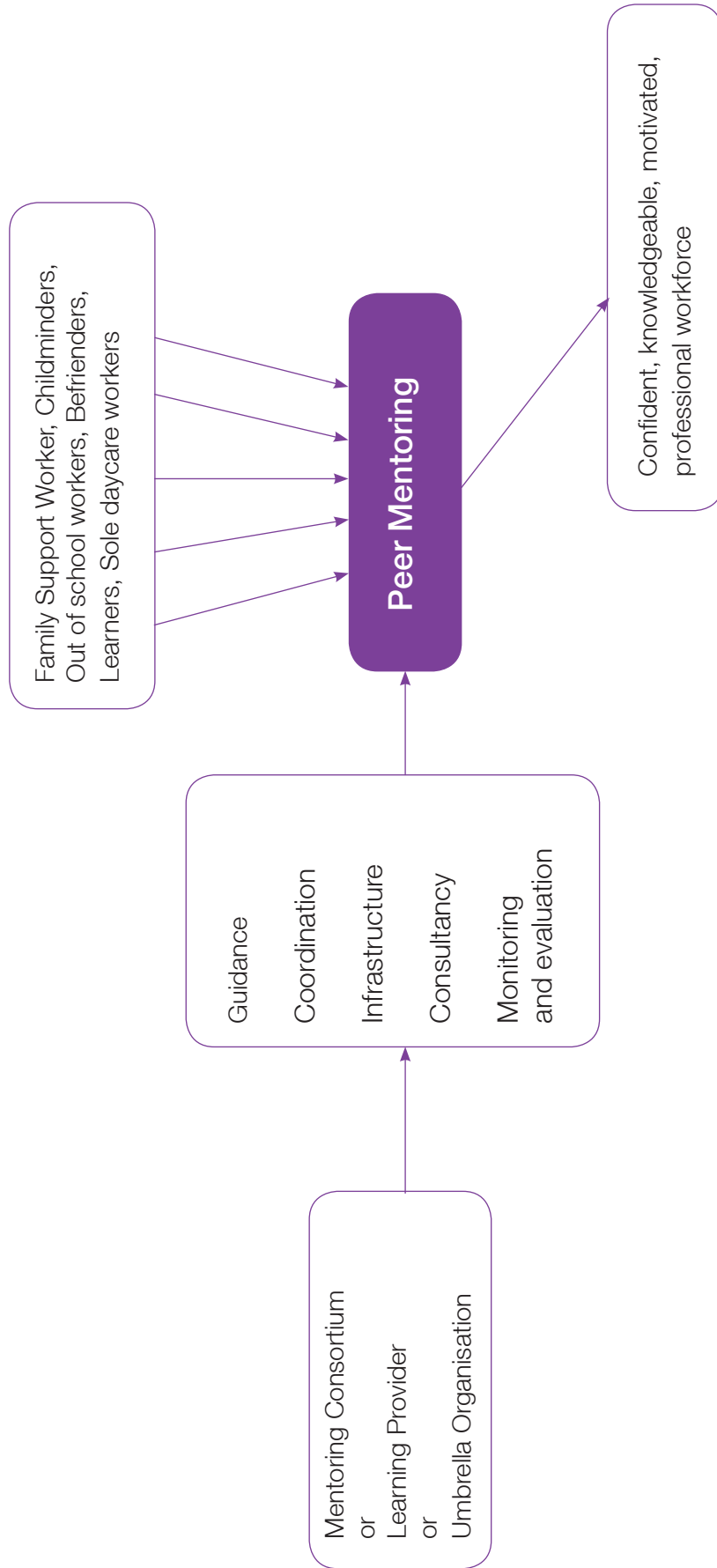
2. HOW CAN THE GUIDANCE BE USED?

This guidance is not designed to be read from cover to cover. You can dip into at any stage of the design, development and implementation of a mentoring model.

Employers and senior managers may find it useful in:
- aligning the programme with existing policies
- forming strategic partnerships to develop mentoring practice across different organisations
- identifying ways to integrate mentoring with other services to contribute to the organisation's wider goals
- deciding how to allocate resources and administrative support for mentoring.

Coordinators and managers of mentoring programmes will find ideas for ways of working that ensure mentors and mentees gain maximum benefit from the experience.

The guidance provides the foundations to develop:
- a policy framework for mentoring
- operational guidelines including templates
- a risk management process
- a monitoring and evaluation strategy
- a training and induction process
- an understanding of the basics of mentoring for stakeholders.

3. WHO IS THIS GUIDANCE FOR?

Mentoring is open to a wide range of interpretations. The underlying philosophy is self managed learning, empowerment and maximising the potential of individuals.

The characteristics of effective mentors are reflected in the skills that able Childhood Practice professionals will already have. As enablers who are good at listening, analysis, reflection and consequent action, Childhood Practice professionals work to support children and families to reach their potential and achieve success in life.

The Coalition of Umbrella Organisations (CCUO) welcomes a broad and flexible approach to interpreting the role of mentoring and has adopted the following definition:

> "A mentor in Childhood Practice successfully develops a professional and challenging relationship to empower their mentee to enhance knowledge, skills and abilities enabling them, irrespective of their workplace, to be confident and effective contributors within the sector."

Go to **Tool A** in the Toolkit to find out more about the characteristics of effective mentors.

Types of Mentoring – Mentoring relationships take several forms:
- **Traditional mentoring**: One to one. This can include a more senior person mentoring a mentee who is junior in the organisation or who is less experienced.
- **Group mentoring**: One mentor with several mentees (with a ratio no greater than 1:4).
- **Team mentoring**: Several mentors working with small groups of mentees (with ratios no greater than 1:4).
- **Peer mentoring**: Mentoring between individuals of equal status and experience.

Mentoring can take place through face-to-face meetings, telephone contact or e-mail and the Internet.

4. WHAT ARE THE BENEFITS OF MENTORING?

Mentoring relationships lead to positive outcomes for those who take part, which in turn lead to wide ranging benefits for organisations.   This approach to professional learning and development, based on inclusion and partnership, also leads to positive outcomes for children and families.

"It was good to talk things through with someone not involved"

"I wish I had talked to you sooner"

"Everything has fallen into place. I feel as though a light has gone on."

"The relationship between my mentor and I was important - built on a solid foundation of respect."

"I wish I had access to this earlier; I was very unsure what was expected from me by the learning institution; being able to talk about it was both reassuring and helped me find a new way forward."

Benefits to mentees include:
- increased capability
- access to mentors' knowledge and experience
- strengthened skills of reflective practice and self-directed learning skills development
- increased professional and personal confidence
- greater collaboration between the learner/mentee and the workplace
- increased commitment through feeling valued and supported
- increased capacity to deliver positive outcomes for children and families.

"Mentoring may have worked better if this relationship had been established at the beginning of the course."

The questions the mentee asked challenged my own thinking."

"I have had to re-examine and reflect on earlier perceptions. Now recognise the importance of a framework and the need for training for mentors."

"I now recognise that I am NOT a natural mentor. Made me reassess how I can best progress mentoring within my organisation."

Benefits to mentors include:
- personal and professional development
- new insights and knowledge
- development of leadership skills
- increased commitment through feeling valued and supported
- greater collaboration between the mentee, mentor and the workplace
- increased capability to support Childhood Practice professional development in individuals, organisations and across the sector.

9

"It was a really positive experience - helped me to establish reasonable timeframes and develop new strategies to reshape current service delivery."

"Undertaking the course enabled me to enhance my organisation's Strategic Staff Development Plan by including a mentoring programme to help empower staff."

"I was able to talk about the impact of my studies on the business; the finance needed to provide cover; innovative ways of tackling the problem, indeed finding that there was no problem in some cases once I had talked through my concerns"

Benefits to organisations include:
- resilient individuals and organisations in times of rapid change
- increased capacity for leadership
- more effective resource management
- better collaborative performance
- sharing of good practice and knowledge transfer within and across organisations
- better staff retention
- good preparation for succession planning and long term talent management
- increased capacity as a learning community
- a cost effective solution to the sector in a time of shrinking resources
- integration of other key processes, for example self evaluation, reflective practice, feedback and listening skills.

Ultimately the benefits for individuals and organisations through mentoring will lead to better outcomes for children and families through improved services that are lead by a workforce with:
- higher levels of professional skills
- improved qualifications
- knowledge transfer
- improved leadership of those delivering and leading services
- raised aspirations of the childhood practice workforce (for themselves and others)
- greater resilience to manage change and lead the improvement agenda.

5. WHY ADOPT A FORMAL APPROACH TO MENTORING?

Research shows that the most effective programmes are supported by a coherent organisational structure, which provides focus and direction to the mentoring model, whilst remaining person-centred and unencumbered by bureaucracy. Poorly designed and unsupported mentoring programmes risk failure.

Mentoring is about adding value. This happens more readily when it is formally integrated with other learning and development and embedded in the organisation's wider human resource and career development operations. Having a formal framework also shows a commitment to mentoring as a key aspect of organisational learning.

A formal framework can be introduced regardless of the:
- 'business' of the organisation
- age and experience of the mentors and mentees
- culture of the workplace.

6. KEY INGREDIENTS FOR SUCCESSFUL MENTORING FRAMEWORKS

A successful mentoring framework needs careful planning and design.

Taking time to plan offers individuals and organisations the chance to interpret and tailor a mentoring programme to their needs. The framework should allow for the development and further expansion of a consistent mentoring model.

When developing a Childhood Practice mentoring framework organisations may choose to build on existing policies and guidance, addressing any gaps and avoiding duplication. Others may develop specific guidelines or policies tailored to their own requirements. The requirement for registration and inspection of a service and current relevant legislation should also underpin the design of the model.

Because there are so many different settings for Childhood Practice, a variety of models may be needed. However, some key ingredients are necessary in a mentoring framework to ensure consistency, promote success and provide a benchmark to measure continuous improvement. They are:

- a clear vision and purpose that is shared with, and understood by, all stakeholders; internal and external
- ongoing support from employers and senior managers who understand the basic concepts of mentoring, and who are clear about the purpose and intended outcomes of the programme
- a tailored mentoring framework and model that links with the strategic aims, operations and existing learning and support activities and which is flexible enough to meet the needs of the organisation and individual learners
- a mentoring framework and guidelines that are up to date and clear, with basic administrative support in place
- clearly defined roles, responsibilities and distinctions for mentors and mentees clarifying the boundaries
- a risk management and exit strategy to ensure the smooth running of the scheme, to minimise problems and the risk of failure and to promote a 'no blame' culture
- channels for communicating information to all staff in an organisation, whether they are taking part or not, about who is running the scheme, and about the processes involved
- clearly defined criteria and processes in place for recruiting, selecting and matching mentors and mentees, and accessible routes into mentoring for those who meet the criteria
- a monitoring and evaluation strategy in place
- sufficient resources, including an adequate number of trained mentors

7. DESIGNING A FRAMEWORK

A mentoring framework will help planners to create guidelines and processes to support continuously those who take part.

When the planning process is complete, decisions will have been made about:
- the purpose, goals and parameters of the programme
- the Childhood Practice mentees who will be supported
- the expected outcomes for mentors, mentees and other stakeholders in Childhood Practice
- the type of mentoring programme on offer, including the length, processes and timescales for mentoring meetings
- the sourcing, recruitment and selection processes for mentors
- resource requirements
- monitoring and evaluation processes
- the role of the mentoring coordinator/programme manager
- channels and methods of communication.

Tool B is about self assessment and will be useful during the planning stage of a mentoring programme. It will also inform the risk management process.

Tool C is a mentoring framework template that can be adapted to suit individual employers and organisations.

8. COORDINATING A MENTORING PROGRAMME

Having a well-managed programme is crucial in providing credibility and consistency. A programme manager or coordinator should measure progress, identify on-going improvement needs, and have a pivotal role in ensuring that the programme runs smoothly. In larger organisations, this could be a designated post. In other smaller or less well-resourced organisations this role may form part of an individual's ongoing responsibilities.

The coordinator's role and their ability to function effectively, will in turn influence the effectiveness of the programme in maximising the benefits to mentors, mentees and organisations.

The functions of a coordinator include:
- sending out and gathering information
- finding and recruiting participants
- matching mentors and mentees
- arranging training
- monitoring and supporting mentor/mentee relationships
- evaluating progress
- providing a point of support and referral
- organising ongoing meetings between groups of mentors to provide peer support
- risk management.

9. TRAINING, INDUCTION AND RAISING AWARENESS

As a learning and development tool, mentoring is most likely to succeed if the goals, structure and processes of the programme are clear, easy to understand and owned by:
- those who are closely and actively involved
- employers and other senior managers
- those who may be at the edges of the activity but influence it.

Awareness-raising sessions communicate the context and rationale of the mentoring programme to those who are affected directly or indirectly and will encourage a sense of ownership.

Why do we recommend mentor training?

The International Mentoring Association has found that mentor training is the most important variable to the success of the mentoring relationship. It is the feature most frequently recommended by experienced mentors to prepare and build confidence in the role. The supportive environment provided by training also helps potential mentors to make an informed decision about their own capacity for the role.

Mentor training set within the context of Childhood Practice will provide an overview of the:
- purpose, objectives and context of the programme
- organisation's strategic aims and values
- boundaries of the mentoring function within the organisation
- breadth of the programme coordinator's role and responsibilities
- breadth of the mentor's role and responsibilities.
- benefits which mentoring can bring to a mentor's own professional and personal experience.

Why provide induction for mentees?

Many programmes put all their effort into the training and development of mentors, failing to recognise the importance of induction for mentees. To get the maximum benefit from taking part, mentees need to understand the roles and responsibilities of both the mentee and mentor. Early induction will clarify the boundaries of the relationship and the measures which the organisation has in place to minimise and manage risk. It will help mentees take ownership of their personal development.

Here are some tips to help mentees get started in a mentoring relationship.
- Arrange regular meetings and commit to attend, giving the mentor plenty of notice in the event of non-attendance.
- At the first meeting, consider and agree with mentor:
  - whether there should be a fixed schedule of meetings or schedule the next after each meeting
  - time limits for meetings/contacts and stick to them
  - contact arrangements outside normal meetings and honour them.
- Agree a meeting agenda so there is time to think about areas for discussion. Preparing in advance to discuss items is essential.

- Explore with the mentor what it is that you, the mentee, want from the mentoring relationship, for example your goals and career aspirations.
- Use meetings to gather information about relevant specialist issues.

The mentor is there to help you decide your objectives, how you might achieve them and help break them down into manageable targets with appropriate time frames. It is not the mentor's role to make decisions for you. You should discuss anything you are uncertain about.

Tool D is a list of the characteristics of successful mentees.

10. CRITERIA FOR SELECTING OF MENTORS AND MENTEES

Several factors will influence the choice of selection criteria, including the mentoring model, the size of the organisation and the availability of resources. Having clear selection criteria can minimise problems at a later stage. Not everyone who offers to take on the mentoring role will be suitable. Equally, not everyone who comes forward as a mentee, will be able to commit fully to the process.

How flexible the selection criteria will be and plans for counselling those unsuitable for the role are best addressed at the design and planning stage of a mentoring programme.

Similarly, it is important to consider what conditions would disqualify mentors or mentees from continuing and how that situation would be managed. Existing policies, codes of practice and HR processes govern recruitment, selection and professional conduct issues probably cover how to manage this type of situation if it arises.

Selection criteria may include:
- position in the organisation
- length of service
- willingness to take part in mentor training or mentee induction.
- previous experience of mentoring or being mentored
- willingness to abide by guidelines
- commitment to timescales
- willingness to enter a reciprocal learning relationship.

Tool E is a flow chart which illustrates the process for recruiting and selecting mentors and mentees.

11. MATCHING MENTORS AND MENTEES

At the design stage it is crucial to decide whether or not individuals are matched according to set criteria or more randomly.

Think about the importance of empowerment and individual choice within the matching process. Where there are opportunities for choice, some mentoring schemes encourage the mentors and mentees to choose their own mentoring partner.

Other considerations for matching may include:
- geographical location
- partnerships
- financial constraints
- size of the organisation
- culture of the organisation.

For a variety of reasons, matches may not work and the relationship will end. Decisions about whether or not to re-match, and how to manage this process, are again best decided at the planning stage.

It is good practice to have a mentoring agreement, completed and signed by mentors and mentees at their first meeting, which clarifies the expectations of both parties.

Tool F is an example of such an agreement.

12. THE MENTORING PROCESS AND THE RELATIONSHIP CYCLE

The mentoring process is well documented by the International Mentoring Association and Tool G is a working model published by them.

A good relationship between the mentor and mentee is crucial. **Tool H** is a relationship cycle showing characteristics of mentoring meetings/contacts, and the skills used by the mentor for each stage of the relationship.

13. WHAT IS THE PURPOSE OF THE FIRST MEETING?

The success of the initial meeting, whether online, telephone or face-to-face, will set the tone of future meetings. Although the mentee needs to take some responsibility for the success of the relationship, it is the primary responsibility of the mentor to:
- **manage and organise the meetings**
- **set the stage for progression**
- **discuss and establish the boundaries of the roles**
- **support the action planning and goal setting process**
- **discuss and agree what each partner hopes to get from the experience**
- **review the purpose of the programme.**

Action planning and goal setting are essential skills for mentors, as they will be central to the meetings. Go to **Tool I** to find out more about this. **Tool J** is an example of an action planning and goal setting template. It can be adapted to suit organisational needs.

Effective mentoring relationships promote mutual learning and sharing. However, as with the principles of adult learning, the mentee as the principal learner should be encouraged by the mentor to have ownership and responsibility for their own learning. In creating a supportive learning environment, where the mentee can try out new strategies and ideas, the mentor:
- provides a confidential, non-judgemental and non-directive environment
- creates a relationship where responsibility for it is shared
- creates an environment of mutual learning.

Tool K gives some useful suggestions for creating optimum conditions for effective adult learning. Decisions about what information to record from each meeting will vary across programmes. The main reason for keeping a meetings log is to have a record for both participants of:
- agreed actions, goals and timescales
- outcomes achieved
- general mentee progress
- information such as time and length of meetings.

The meetings log will be useful for monitoring and evaluation. Both participants should be clear about what happens to the completed logs and what they will be used for.

Some issues to consider when planning meetings are available in **Tool L**.

**Tool M** is an example of a meeting log. It can be used as it is or tailored to suit your needs.

Tool N is an example of a mentor log from the CCUO pilot study in 2010. The log highlights the care taken to establish the mentoring relationship and the subsequent contacts. It does not give any details of the content of discussions between the mentor and mentee: that remains confidential to the relationship.

14. MONITORING AND EVALUATION

Monitoring and evaluation provides the evidence that is needed to show that mentoring in Childhood Practice develops a more skilled, competent, confident and well-qualified workforce, with professional:
- values and personal commitment
- skills and abilities
- knowledge and understanding.

It will also show that the workforce is taking professional action continuously to improve children's learning and development opportunities.
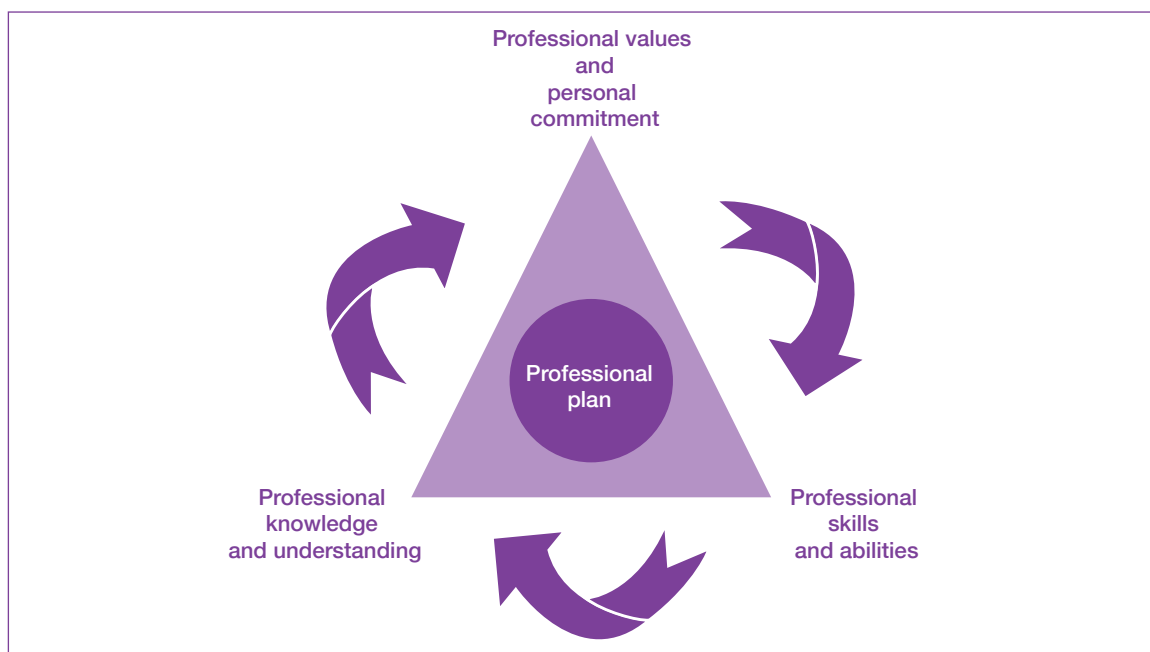
The monitoring and evaluation process has to be realistic, taking into account timescales, available resources and budgets. Both qualitative and quantitative data gathering will provide a rich source of information to ongoing developments within the programme and, more widely, the improvement and leadership agenda for the childhood practice workforce.

Monitoring

Monitoring helps manage risk and is an effective tool for measuring quality. It helps participants and management to focus on the purpose of the programme, highlighting when problems arise to allow early intervention.

Monitoring focuses on outputs. Some sources of monitoring data are:
- scheduled meetings with mentors and mentees
- documents that record on-going feedback
- written records such as logs, action plans from meetings, other communications
- input from stakeholders

21

- analysis of processes for dealing with issues such as re-matching, addressing issues within relationships, early termination of the mentoring relationship
- data from on-going training and support sessions with mentors.

Regular meetings between coordinators/programme managers and mentors also provide useful data for monitoring purposes.

The nature, destination and intended use of the data collected must be clear, to reassure individuals that it will not feed directly into performance review processes and that personal information will remain confidential.

Tool O gives ideas of what might be measured as part of a monitoring strategy.

Evaluation

The childhood practice sector already has a culture of self-evaluation and this supports mentoring evaluation. Evaluation is an integral part of the early planning process. It is not a 'bolt on' and the criteria for measuring success should be agreed and shared with all concerned at the design stage. Evaluation is challenging and it takes time. Qualitative evaluation, providing a rich source of data, can be difficult to achieve and validate. Getting information from those no longer in the mentoring programme can be difficult. However, being aware of the challenges and looking for solutions at the start will help avoid common pitfalls.

Evaluation can:
- provide an outcome analysis for both the programme and the mentoring relationship: what difference does the programme aim to make and what difference has it actually made?
- capture the unintended outcomes, both positive and negative to inform on-going developments
- highlight what has and has not worked, to feed into continuous improvement
- provide evidence for sponsors, employers, senior managers and funders in deciding whether or not to continue supporting the activity.

Decisions also have to be made from the outset about who will collect, analyse and manage the data.

REFERENCES

ASH Scotland (2002) *The Evaluation Journey*

Association of Colleges and FENTO (2001), *Mentoring Towards Excellence P/0005/01*, Coventry: Learning and Skills Council.

Clutterbuck D (2004) 4th ed. *Everyone Needs a Mentor, Fostering Talent in your Organisation*, London, Institute of Personnel Management.

Colley H. (2003) *Mentoring for Social Exclusion: a critical approach to nurturing mentor relationships*, New York: Routledge Falmer.

Getting It Right for Every Child (GIRFEC); (2008)

International Mentoring Association, **http:www.mentoring-association.org**

Klasen, N., and Clutterbuck, D., *Implementing Mentoring Schemes: A Practical guide to successful mentoring*, Butterworth Heinemann, Oxford 2007.

Pre-birth to Three Years: Positive Outcomes for Scotland's Children (2010)

QAA (2007) *Scottish subject benchmark statement: The Standard for Childhood Practice*

Scottish Mentoring Network, **http://www.scottishmentoringnetwork.co.uk/**

Speck, M. (1996, Spring). *Best practice in professional development for sustaining educational change*. ERS Spectrum, 33-41

Social Services Skills Council. *Investing in Children's futures: The new childhood practice award* (May 2010) Issue3

The Befriending Network Scotland and Scottish Mentoring Network, *Evaluation and Resource Pack for Befriending and Mentoring Project*

University of Brighton, Social Mentoring Research Group (2006) *Towards an Understanding of Mentoring, Social Mentoring and Befriending*, Community University Partnership Programme at the University of Brighton.

Wallace, S. and Gravells, J.,(2007). *An A-Z for all FE managers*. London: Continuum

TERMS WE HAVE USED AND WHAT THEY MEAN

Autonomous – self-governing

Curriculum for Excellence (CfE) – CfE aims to achieve a transformation in education in Scotland by providing a coherent, more flexible and enriched curriculum from 3–18 years.

Childhood Practice Workforce – individuals who work in services that support children and families, including early education, childcare and play work services.

Coalition of Childhood Umbrella Organisations (CCUO) – A working group of the Childhood Practice Development Group whose members include the Association of Quality Nurseries Scotland, Care and Learning Alliance, National Day Nurseries Association, Scottish Childminding Association, Scottish Pre-school Play Association, Scottish Out of School Care Network and a representative from the Childcare Partnerships. The purpose of the group is to 'sustain and continue to develop a professionally recognised qualified workforce within the voluntary and independent childhood sector'.

Continuous Learning Framework (Clf) – the Clf was developed by the SSSC in partnership with the Institute for Research and Innovation in Social Services. The Clf aims to improve outcomes for people using services by supporting the workforce, enabling them to be the best they can be. It sets out the shared commitment needed from socials services workers and their employers to lifelong learning and continuous improvement.

Organisation – a business, government department, charity, pre-school service providers, umbrella groups.

Stakeholder – an individual or group with an interest in the success of an organisation in delivering intended results and maintaining the viability of the organisation's services.

Strategic Partnership – a relationship between two or more organisations that involves building mutual long-term goals and commitments.

Umbrella organisation – a coordinating or unifying agency supporting and representing groups or services that share a common purpose.

MENTORING TOOLKIT

TOOL A: WHAT MAKES A GOOD MENTOR?

Checklist

Professional knowledge and understanding of:

☐ different learning styles; their own learning style and how others learn

☐ adult learning and creating environments to support learning

☐ power relationships and impacts within mentoring

☐ their own personal strengths and areas for improvement

☐ professional boundaries of a mentor

Skills and abilities:

☐ empathy

☐ good listener

☐ reflective

☐ building and maintaining rapport

☐ relationship and expectation management

☐ communication skills

☐ self management

☐ goal setting

☐ organised

☐ questioning skills

☐ giving feedback

☐ motivating

Attributes:

☐ patience

☐ self confidence

☐ self aware

☐ encouraging

☐ commitment to learning and development

☐ sense of humour

☐ flexible

☐ non judgemental

TOOL B: SELF ASSESSMENT PLANNING TOOL

The following self-assessment activity is designed to help in the planning stages of a mentoring programme. It can also be used to inform a risk management process.

1. Identifying the purpose and aims

Ask yourself	Jot down points to consider
What is the purpose of the programme?	
What are the goals of the programme?	
Why is mentoring considered the right method for achieving those goals?	
Who are the stakeholders?	
How will the purpose of the mentoring programme be communicated to stakeholders?	
What are the time frames?	
How will success be measured?	

2. Support the programme

Ask yourself	Jot down points to consider
Who is driving the scheme?	
Who needs to be recruited to support the programme?	
How will buy in from senior managers and decision makers be achieved?	
What resources, including financial, are needed?	

3. Managing the programme

Ask yourself	Jot down points to consider
Who will manage the scheme?	
What are the expectations of the programme manager/co-ordinator?	
How will information be disseminated and communication be facilitated among mentors, mentees, programme co-ordinator and other stakeholders?	
What support is needed?	
What will the reporting structure of all the participants be?	
How will the relationship between the mentoring programme and the organisation's line management function be managed?	
How and when will mentoring happen?	

4. Participants

Ask yourself	Jot down points to consider
Where will mentors and mentees come from?	
How will you recruit them, for example, internally or externally?	
Are there any other potential sources of mentors/mentees?	
How and who decides who will have access to a mentor?	
What are the criteria for recruiting and matching?	
Will mentos have more than one mentee?	
What are the roles and responsibilities of each participant, for example, the mentee, mentor, co-ordinator and the organisation's line managers?	

5. Training and orientation

Ask yourself	Jot down points to consider
What information and training will mentors need?	
Will this be a one off or an on-going process?	
How will orientation training for mentees be provided?	
What will be included in the mentee orientation?	
What information and training will the programme manager/co-ordinator need?	

6. Managing the mentoring relationship

Ask yourself	Jot down points to consider
For how long and where will mentors and mentees meet?	
What will be the frequency of meetings/contacts?	
Will participants have to keep a record of what is discussed and progress made?	
What boundaries will be set for the mentoring relationship?	
How will problematic issues be dealt with, for example, problems within the programme, issues between mentor and mentee?	
What support and supervision will mentors receive?	
What support and supervision will the co-ordinator receive?	

7. Risk

Ask yourself	Jot down points to consider
What risk factors have been identified for the programme?	
What actions are needed to minimise risk?	

8. Monitoring and evaluation

Ask yourself	Jot down points to consider
What needs to be monitored and evaluated?	
What information needs to be gathered – when, how, why and by whom?	
How will effective stakeholder reviews be managed?	

TOOL C: MENTORING FRAMEWORK TEMPLATE

Policy Name: _____ Mentoring Policy

Date Approved: _____

Related Policies: _____

Overview

1.1 This policy provides a standard definition for, and a consistent approach to, mentoring for
_____. (name of
organisation).   Mentoring is defined as a _____ (define
mentoring in the context of your organisation) Responsibilities for performance management
are distinguished from those of mentoring relationships. Attention is drawn to existing policies
on conduct and equity that must be observed within individual relationships and in programme
design. Principles of best practice for programme design are provided. The organisation is guided
centrally by the Codes of Practice of the Scottish Social Services Council for employers and the
social services workforce.

1.2 The role and responsibility of the heads of organisations and managers for staff development and
performance management is not diminished by application of this policy.

2. Aims and objectives

2.1 This policy provides a framework, based on best practice principles, to support and inform the
design and development of mentoring practice for _____
_____ (describe in terms of a local, national, internal or external context).

2.2 The objectives of this policy are to:
* emphasise that mentoring is a voluntary relationship and is not a process to be imposed,
* recognise mentoring as a valued element of the staff development framework
* ensure that mentoring is not confused with, or substituted for, the performance
appraisal system
* establish that mentoring relationships are governed by existing policies on quality, equal
opportunity, inclusiveness, code of conduct and privacy.
* support and encourage mentoring as part of the organisation's overall strategic plan.

2.3 It is expected that senior managers will review the mentoring needs of their staff as part of their
annual strategic planning process.

3. The mentoring relationship

3.1 The nature of mentoring relationships varies according to the context and purpose of establishing
them. Mentoring can be used to transfer specific skills, knowledge and professional learning
and development. In a staff development framework that emphasises self-managed learning,
best practice is mentoring that encourages mutual learning and development in support of
organisational goals.

31

3.2 _____ (name of the organisation) views
mentoring as a private and non-reporting relationship that:
- _____
- _____
- _____ etc

3.3 _____ (name of the organisation) recognises
the need for flexibility within a mentoring programme, as the context and purpose of programmes
will vary and some variability in the mentor role might be expected. However, the following
fundamental principles will apply to the mentor's role:
- Commitment to developing others and to the mentoring process.
- Respect privacy and confidentiality
- Commitment to CPD
- _____
- _____
- _____
- _____ etc

3.4 The role of the mentee may also vary depending on the context and purpose of the mentoring
program but will, in principle, include:
- _____
- _____
- _____ etc

4. Recognition of mentoring as a valued element in staff development
4.1 The head of _____ and managers will be encouraged to
recognise the value of mentoring skills by:
- planning for staff, who will act as mentors, to receive appropriate training and adequate
support as and when required,
- taking account of the workload implications when planning the contributions of individuals as
mentors or as mentoring programme coordinators,
- acknowledging significant individual contributions and good practice as a mentor in
performance reviews for staff.

5. Relationship of mentoring to staff appraisal and performance management
5.1 The head of _____ and managers have responsibility for
nurturing the staff reporting to them. This could include activities associated with mentoring.

5.2 Key characteristics of the mentoring relationship
5.2.1   The mentor has no
- responsibility or authority over the mentee
- role in dealing with issues of non-compliance or under-performance
5.2.2   The mentoring relationship provides a confidential, non-judgemental and non-directive
environment
5.2.3   The partners in a mentoring relationship are equal within it and share responsibility for the
relationship

5.2.4   Mutual learning is an integral aspect of the mentoring relationship

5.2.5   The overall developmental needs of the mentee are the main focus within the mentoring relationship.

5.3 Line managers will take part in discussions to arrange a mentoring relationship for a staff member who reports to them. They should be aware of staff development needs as well as what appropriate support mechanisms are available, including formal mentoring arrangements, and they should pass that information to staff.

5.4 Specific development outcomes or issues from within the mentoring relationship may be fed into the annual review process, if requested by the mentee and agreed to by the mentor. However, line managers have no direct role in the relationship and should not expect to receive information that is **confidential** to the relationship.

6. Code of conduct, equity and confidentiality

6.1 The mentoring programme in _____ (name of organisation) will adhere to:
- the Scottish Social Services Council's Codes of Practice
- policies and procedures relating to personal relationships in the workplace
- _____ etc

6.2 The mentor and the mentee are equally responsible for ensuring that the mentoring relationship is conducted within the bounds of these policies.

6.3 Both the mentor and mentee have a duty to respect the confidential nature of the relationship and the dialogue that takes place within it.

All participants in the programme have a responsibility to know the relevant policies and procedures, and to understand how these impact on the mentoring relationship. Participants have equal responsibility for ensuring they comply.

7. Implementation

7.1 _____ (insert name of organisation) has a programme coordinator to implement and manage the mentoring programme. The coordinator will:
- organise ongoing training available for mentors
- provide induction training for mentees
- co-ordinate a communication strategy to promote a consistent approach to mentoring throughout the organisation
- monitor and evaluate the mentoring practice
- provide implementation guidelines which comply with the organisation's policy and procedures; up-dating these when evaluation results indicate this is necessary
- _____
- _____
- _____ etc

33

8. Principles of best practice in mentoring arrangements

8.1 _____ (insert name of organisation) will implement and review its mentoring programme against the following.

- Provide a clear statement of objectives for the programme.
- Ensure that information about the programme is equally available to all staff.
- Recruit individuals to the programme who support and champion it.
- Recruit a coordinator to manage the mentoring programme.
- Provide clear statements on the roles and expectations for all parties.
- Encourage staff to volunteer as mentors and mentees. This may include identifying potential participants.
- Base mentor recruitment and selection on a list of skills that are consistent with the programme's objectives.
- Support mentees to establish clear goals and development objectives.
- Provide the opportunity for any participant to request a change in mentoring partner or to withdraw from the programme without recrimination.
- Provide training and other support available for all participants, including the co-ordinator of the mentoring programme.

8.2 Design on-going monitoring and evaluation for the programme ahead of its implementation. This policy will be reviewed and updated on an annual basis to ensure good practice is maintained.

Adopted _____

Signed _____

TOOL D: CHARACTERISTICS OF SUCCESSFUL MENTEES

- Good mentees take **responsibility** for the success of the mentoring relationship and their own development needs. They do not search for scapegoats to blame for their own shortcomings.

- Good mentees show **respect** for the time and effort being devoted to them by their mentor and keep their appointments (or re-schedule in advance). If things are not working out they then talk this through with their mentor rather than failing to show up.

- Good mentees are **responsive** to help. They are open to new ideas, committed to change and keen to agree actions to develop skills.

- Good mentees are **reflective**. They see mentoring as a way of raising their self-awareness, so that they can learn from experience.

TOOL E: FLOWCHART FOR RECRUITING AND SELECTING MENTORS AND MENTEES

Criteria for mentor/mentee selection developed

↓

Invitation within and across organisation/s for mentors

↓

Invitation within and across organisation/s for mentees

↓

Program coordinator gathers relevant information from potential mentors and mentees, for example qualifications, summary of work history, skills, knowledge, attributes required or offered, reasons for wishing to take part in the programme

↓

Select mentors and mentees

↓

Mentor training

↓

Mentee induction/orientation

↓

Raising stakeholder awareness

↓

Mentors contacted within a week to arrange meeting and venue

↓

Mentors and mentees matched

TOOL F: SAMPLE MENTORING AGREEMENT FORM

We are both voluntarily entering into this partnership. Our meetings will focus on the mentee's learning and development issues.

We agree that:

1. The mentoring relationship will last for _____ months. This period will be evaluated every three to six months. The timescales for the meetings will be decided by the programme and will end at the predetermined date.

2. We will meet at least once every _____. We undertake to honour all pre-arranged meetings unless there is an unavoidable cancellation. If this happens we will arrange an alternative date.   If for any reason either of us cannot make a meeting we will inform our partner at least 24 hours in advance and arrange an alternative date.

3. Each meeting will last a minimum of _____ hours and a maximum of _____ hours.

4. In between meetings we will contact each other by telephone/email no more than _____ a week.

5. The aim of the partnership is to work on the following issues:
    a)
    b)
    c)

6. We agree that the mentor's role is to:
    _____
    _____
    _____

7. We agree that the mentee's role is to:
    _____
    _____
    _____

8. We agree that the content of these meetings will be confidential.

9. The mentor agrees to provide constructive feedback to the mentee. The mentee agrees to be open to the feedback.

10. We agree to forward any necessary documentation to the coordinator of the programme. We understand that it will be used to inform evaluation processes.

Date: _____   Date for Review: _____

Mentor's signature: _____

Mentee's signature: _____

37

TOOL G: A WORKING MODEL OF THE MENTORING PROCESS

Process stages	Mentoring activities	The purpose
Introduction	Introductions, sharing of backgrounds, interests and personal information.	Create a connection.
Foundation	Explain mentor-protégé roles, relationship and the mentoring process. Explain expectations. (This can include a 'negotiated' agreement/plan.)	Clarity of and consensus on purpose
Orientation	Orientation to the local site, department, staff, organisation and community as needed. Orientation to new job responsibilities, work processes, competencies and expectations.	Reduce the stress and increase the team feeling.
Collaboration	Work together to prepare and plan for start of the protégé's work assignment. Mutual sharing of ideas, discovering how work flow, time and paper work management, and collaboration support both partners' work effectiveness and learning and development.	Good start, build team, mentor seen as a caring helper.
Problem solving	Joint analysis of issues and problems. Development of options, strategies and plans to implement and evaluate results.	Development of thinking and knowledge.
Personal * framework	Building a strong mentor-protégé relationship. Reinforce protégé self-esteem and confidence. Explore each others' career dreams, views and strengths as employees and as persons.	Mentor is seen as trustworthy and an openness is created.

Professional * framework	Discovering the 'big picture' such as: 1. planning activities as a sequence 2. assessing results and adjusting activities to increase effectiveness 3. worrying less about following plans and more about accomplishing a plan's purpose.	Mentor seen as a model and protégé is increasing skill, insight.
Professional development	Building a 2-way coaching relationship where mutual feedback and support for learning and increased effectiveness is the norm.	Promote mentor and protégé growth.
Transition	Building a peer relationship, promoting the protégé's ability to work independently, but maintaining support for each other's growth. Promoting learning and support links with other staff, creating a broader team concept.	Promoting mentor and protégé inter-dependence.

39

TOOL H: THE RELATIONSHIP CYCLE

Stage	Characteristics	Skills
1. Beginning: establishing rapport	Getting to know each other The first impressions Trying to see the positive in the relationship Bonding Exchange ideas about the nature and boundaries or limits of the relationship Agree a formal structure for meetings Agree on processes for working together Begin to determine goals through action planning processes	Ask open-ended questions Use body language that is open and not guarded Listen actively Demonstrate empathy Avoid being too prescriptive Use prompts Agree how you will work together Non judgemental
2. Challenging and testing: setting direction	Mentee challenges Testing phase Rethinking first impressions Difficult feelings or emotions may surface Be consistent in your communication, even if it is difficult Demonstrate respect Raise sensitive issues at the beginning of your interactions	Build problem-solving techniques into your open-ended questions Work with mentee to diagnose learning needs Set goals and identify priorities Refine action plan Learn about mentees learning style. Share yours

3. Progression 'mentoring for real'	The relationship begins feeling right again Trust is established Growth in the mentee can be observed A 'deeper' bond and connection has been formed Greater mentee independence May be some disclosure Sharing expertise Adapt goals and processes in light of review – new issues identified Relationship evolving Outcomes being achieved	Avoid advising, and allow mentee to actively problem solve Build on your knowledge of your mentee's strengths to foster deeper discussions Give positive feedback Challenge where appropriate Monitor progress Support and encourage mentee independence
4. Ending: preparing for closure	Relationship may become deeper or mentee may start pulling away Reflection Find common language to sum up your feelings Move towards maintenance stage	Provide feedback that describes growth that you observed Discuss learning points Be prepared to listen and affirm the fears that your mentee may have Renegotiation Evaluation of the experience Identify next steps

TOOL I: ACTION PLANNING AND GOAL SETTING

Action planning and goal setting are key mentor skills.   They provide the focus and direction of the working relationship.

Action planning is a clear, step-by-step process to achieve the goals. This means helping the mentee create a vision of where they are going. Clarifying the vision, creating a plan and setting goals are recognised tools for self-management which can enhance personal and professional performance. Planning is also useful in developing personal organisation skills.

Written action plans should:
• record the mentee's needs and strengths
• record goals and targets
• set out some of the principal strategies to be used to bring about the desired change
• identify actions that will be needed to support the mentee achieve their goal
• state the targets for progress and dates for review.

An important part of the work that you will do as a mentor is to help break goals down into manageable steps or **targets**, which are 'SMART' – that is:
✓ Specific
✓ Measurable
✓ Achievable
✓ Realistic
✓ Time-bound.

They will also help your mentee develop strategies for achieving their targets, and their goals.

When helping your mentee develop the skills of action planning and goal setting it is best to start with a few simple, straightforward goals.   They should be careful not to set goals that are too numerous, or too complex.

As your mentee achieves results, you can support and guide them towards increasing the number of goals and adjusting time frames.

The best way to begin to determine goals is to work on some simple opening questions.

Question 1. What do I aim to achieve through mentoring processes?
Question 2. What three short term goals can I set myself to get me started? Make sure their answers are specific and measurable.
Question 3. Where am I today in relation to my three goals?
Question 4. What Actions Steps do I need to put in place to get me from where I am today to where I want to be?
Question 5. What is the time frame required in order to complete each Action Step? Putting time frames for each action step allows them to monitor their progress, and helps to keep them on track.
Question 6.   What resources do I need to achieve my goals? Where will I find the resources? Who else do I need to help me?

Goals may be either short or long term. There must be an action tied to each goal. If your mentee has one big goal they may need help to break it down into smaller parts, or short term goals with actions for each. Are your mentee's goals achievable within the time frame?

TOOL J: ACTION PLAN TEMPLATE

Mentee name: _____

Action plan _____ Start date: _____

Completion date: _____

Goal 1			
Actions	**Timescales**	**Milestones**	**Success criteria**

Additional comments:

TOOL K: OPTIMUM CONDITIONS FOR EFFECTIVE ADULT LEARNING

M. Speck suggests in 'Best practice in professional development for sustaining educational change', (1996) that the following important points of adult learning theory are considered when designing professional development activities. They inform the work of skilled mentors, working with adult mentees, in developing and supporting effective learning strategies.

- "Adults will commit to learning when the goals and objectives are considered realistic and important to them. Application in the 'real world' is important and relevant to the adult learners personal and professional needs.
- Adults want to be the origin of their own learning and will resist learning activities they believe are an attack on their competence. Thus, professional development needs to give participants some control over the what, who, how, why, when, and where of their learning.
- Adult learners need to see that the professional development learning and their day-to-day activities are related and relevant.
- Adult learners need direct, concrete experiences in which they apply the learning in real work.
- Adult learning has ego involved. Professional development must be structured to provide support from peers and to reduce the fear of judgment during learning.
- Adults need to receive feedback on how they are doing and the results of their efforts. Opportunities must be built into professional development activities that allow the learner to practice the learning and receive structured, helpful feedback.
- Adults need to participate in small-group activities during the learning to move them beyond understanding to application, analysis, synthesis, and evaluation. Small-group activities provide an opportunity to share, reflect, and generalise their learning experiences.
- Adult learners come to learning with a wide range of previous experiences, knowledge, self-direction, interests, and competencies. This diversity must be accommodated in the professional development planning.
- Transfer of learning for adults is not automatic and must be facilitated. Mentoring and other kinds of follow-up support are needed to help adult learners transfer learning into daily practice so that it is sustained."

TOOL L: ISSUES TO CONSIDER WHEN PLANNING THE MEETINGS

Ask yourself	Jot down points to consider
Are the objectives of the mentoring activity clearly established and understood?	
Where will the meetings take place?	
How often will meetings take place?	
How long will each meeting last?	
How formal should the meetings be?	
How much support is acceptable?	
How much information should be recorded on the meeting log?	
What happens to the meeting logs?	
Who owns the meeting log?	
Should both parties sign the meeting log?	
How many meetings should it take to produce the first action plan?	
How much confidential information is given to the coordinator?/who decides?	
Will there be a contract between parties creating a signed agreement to stick to the systems and processes for the programme?	

TOOL M: MEETING LOG TEMPLATE

For completion by mentee. Copy to be forwarded to: mentor within x days of the meeting and co-ordinator when required.

Name of mentee:	Name of mentor:	Date of meeting:
Review of action points/targets set at last meeting		
Action points agreed for next meeting		
By whom:	**By when:**	

Signed: Mentee _____

Signed: Mentor _____

TOOL N: CASE STUDY: MENTOR LOG, CCUO PILOT 2010

Establishing the mentoring relationship

25/1/10 – 1st contact was an email saying hello and providing bit of background about me, followed by telephone contact to arrange time for a chat

9/2/10 – arranged telephone call with mentee. Lasted about 30mins. Used it to gain more information about each other and to begin to tease out some of issues for mentee and arrange face to face meeting. Followed up summary email.

2/3/10 – Face-to- face meeting in XXXXXX. Lasted approx 3hrs. Used to build on telephone contacts, establish rapport, check and agree our understanding of mentoring and of our different roles; as well as exploring what we could expect of each other. Began to tease out thinking about mentee's goals for the relationship. Identified a couple of simple action points from our discussion. Discussed frequency and type of meeting – mixture of face to face (within budget constraints) and telephone conversations.

Did some preparation for the meeting and made some bullet point notes as an aid for the session -very helpful.

Used simple techniques to – break the ice; look at our expectations of each other (what we want/ don't want from the relationship…); explore mentee's vision for self which helped our focus and lent itself to unpicking possible goals for the relationship.

At end of session felt we had built sufficient rapport and gained enough direction to move forward. Thought the threads of mentee's goals established; mentee appeared to be of same opinion.

I wrote up summary of the meeting and sent to mentee seeking agreement that it was accurate record. Confirmed it was.

Agreed to continue. Geographical and cost considerations taken into account. Agreed a mix of telephone and face to face contacts. Arranged to have a chat on 26/3/10.

I enjoyed the experience; mentee was welcoming and willing participant. Open to sharing information, her thoughts for her future learning and development and the issues that are affecting her in her learning and work role. Willing to explore further with me as a sounding board, trusted listener and challenger. We covered a lot of ground and mentee's goals for relationship had begun to emerge and agreed to check and refine next time.

Note: A confidential record was made of the meeting and agreed as accurate by mentee and mentor.

Subsequent contacts

26.3.10 Telephone mentoring contact. Duration approx 1hr

Prior to call: Sent email to touch base re call. Mentee sent brief agenda as focus of our meeting which helped my preparation--- mostly about mentee's course of study and work role; one item seeking information from me.

Call: Briefly caught up with each other re family/weather etc before focusing on the purpose of the call. Agreed mentee would make confidential notes of our discussion.

We'd agreed a couple of action points at last meeting and they had been carried out. Outcomes: Mentee feeling more confident; mentee had sought information re course of study – reassured about progress

Discussion Focus:
- Course of study: information gained would help mentee plan her study work more effectively and reduce impact/encroachment on family time. Discussed next piece of study.
- Number of work situations made significant impact on mentee's time; raised number of points for mentee to discuss during session. Through questioning and reflection identified some issues – coping with demands on time, balancing priorities, sense of being alone, lack of information to support practice or to ameliorate sense of frustration and disappointment, bordering at times on anger.

  Mentor able to share similar experiences, which provided additional insight to mentee. Mentee gained additional perspective. Able to bring to light some of the very positive actions the mentee had undertaken to deal with some difficult situations and feelings and unpick with the mentee some of the learning areas and skills development that had taken place. Mentee noted at meeting own knowledge and skills were being strengthened, for example, increased awareness and knowledge of organisations, increased confidence, relationship building, delegation and trust, reflection and rationalising

Confirmed some action points for next period, around…

Agreed next contact date: 30.4.10, Telephone contact.

30.4.10 Telephone mentoring contact. Duration approx 1hr

Prior to call: Sent text to touch base re call and agenda

Call: Brief informal chat first off. Agreed to share recording of confidential note – mentor to note review discussion; mentee's focus was the main discussion and action points we'd agreed to focus on:
1. review of action agreed at last meeting
2. identified areas of discussion – progress with course of study, current work role
3. revisit mentoring objectives and confirm still focus
4. checking mentoring helping; is progress being made.

1. We'd agreed a couple of action points at last meeting and they had been carried out with following outcomes.
   - Mentee feeling more confident, noting progress and responsiveness from staff being managed. Using line management as source of information and feedback more effectively.
   - Sense of frustration and uncertainty re-emerging re course of study - agreed to pick up in main discussion.

2. Discussion focus
   Primary focus and time spent on course of study – mentee had presented work and received it back with comments. Mentee uncertain what was being asked for and what else she could do. Used comparison with mentee's previous learning experiences as starting point to exploring where the difficulties lay, other ways of looking at things and began to unpick what was felt to be a mental block. Mentee acknowledge that discussion had helped clarify and reassure – more confident about next step

3. Revisited and confirmed the goals that had been agreed were being worked towards and were still important to mentee.

4. Is mentoring helping?

   Both thought progress being made. Some achievements acknowledged.

   Relationship offering mentee **'a positive opportunity to reflect'; ' sound things out and test in practice'; 'move forward'; 'recognise and build on skills'.**

   Acknowledged that there had been a lot of sharing experiences which is beneficial to both.

   Agreed next meeting would be face to face and that our discussion would be specifically concerned with exploration of mentee's role.

1.6.10 Face to face mentoring visit. Duration approx 2 hrs and then went out for lunch

Prior: Sent email to touch base and confirm

Meeting: Agreed shared note record

Reviewed action points and what had been happening with mentee. **'Breakthrough'** was the word used in respect of her working towards her qualification – had achieved better communication between her and provider, more focused support from manager, better at making links between own practice and course of study and how her learning is impacting on practice. Achieving units – great morale booster. Mentee feeling more focused and confident, has timetabled and set deadlines for study and assignments and completion. As she said **'can see bright light at end of the tunnel'.** As mentor, sensed shift also in attitude to undertaking further study.

Some general points: mentee felt more able to step back and analyse some aspect of her current priorities and work load more objectively. More aware of other people's roles and priorities which at times had felt inconsistent with her own – increased her perceptiveness which is 'adding value' to relationships.

Discussion focus:
Had agreed previously to focus on mentee's role and used variety of strategies, for example:
- questions which invited explanation of role, examined what she thought the drivers were for this; what were the issues for her
- questions which examined what she wanted to achieve, what her employer wanted her to achieve and explored similarities and differences
- comparing and contrasting similar roles she had undertaken - was one easier than the other? If so why – was it a matter of skills and knowledge, resource, support infrastructure etc?
- how her current learning pathway was supporting her in the complexity of her role.

Conscious in the discussion about not transgressing mentor boundaries and focusing on how to support mentee to explore above — maintaining open questioning very useful, for example, You said… can you explain? It would be helpful if you elaborated on...? Why do you feel this way ...what do you see as the cause ...what do you think would help ...what will you do to make these happen?

Agreed some action points with mentee. Acknowledged may be difficult for mentee to carry forward but urged to stick with it and to reflect and assess outcomes – possible lines of alternative direction may emerge.

Asked if mentee wanted to continue with the relationship (as CCUO pilot was nearing its end). She was very positive about relationship and wanted it to continue. Asked what she had got out of it she responded 'I am definitely benefiting', adding that 'The opportunity to step back and to become detached from the emotions and frustrations of my role'.

We agreed to continue and set date for next contact – telephone contact 23.7.10

TOOL O: MONITORING PROGRESS: WHAT TO CHECK FOR

The questions that follow are not exhaustive but may be helpful in getting you started.

- Is the programme meeting the agreed objectives?
- Is mentoring working in the way it was planned?
- Do the administrative procedures support and guide the process effectively
- Are procedures and processes useful? Can people understand them and use them effectively?
- Are the relationships working well?
- What impact, if any, has there been on others not directly involved?
- What challenges have been raised by the programme/mentors/mentees?
- Have any on-going training needs been identified?
- Are there any issues with your communication strategy?
- What is working well?
- What is working less well?
- What would you do differently?
- What needs to be changed immediately? What should be changed in the future?
- Once you know what should be measured you should decide how you will collect your data.
  - Interview and feedback sessions with stakeholders.
  - Completed questionnaires.
  - Assessing how well goals set within action plans have been met.
  - Statistical information for example qualifications, learning objectives achieved.
  - Evidence from focus groups
  - Review of administrative files?

APPENDIX: CCUO MEMBERSHIP

Members of the Coalition of Umbrella Organisations

Ann Brady	Care and Learning Alliance (CALA)
Margaret Brunton	Scottish Pre-school Play Association (SPPA)
Sylvia McKay	National Day Nursery Association (NDNA)
Maureen McKissock/	
Irene Audain	Scottish Out of School Care Network (SOSCN)
Alison Mackenzie	National Childcare Partnership (associate representative)
Elizabeth Murdoch	Scottish Childminding Association (SCMA)
Kathlyn Taylor	Association of Quality Nurseries Scotland (AQNS)

Programme Learners

Ann Brady	Care and Learning Alliance
Stephanie Bruce	Care and Learning Alliance
Margaret Brunton	Scottish Pre-school Play Association
Linda Burger	Childcare Partnership
Bernadette Burns	Hopscotch Nursery, Scottish Out of School Care Network
Lindsay Cully	Scottish Pre-school Play Association
Val Gale	Care and Learning Alliance
Sylvia McKay	Hopscotch Nursery, National Day Nursery Association
Alison Mackenzie	National Childcare Partnership
Edith Todd	Hamilton School, Association of Quality Nursery Association
Sandra Tucker	Highland and Moray Accredited Training Services
Margaret Williams	Scottish Childminding Association

If you would like to request this document in another format or language, please contact the SSSC on 0845 60 30 891.