3

MENTORING PROGRAMME GUIDANCE STEP-BY-STEP GUIDE

The tools you need to run your programme

RIBA Architecture.com

We recognise that there are many challenges to managing a Mentoring Programme. This guidance has been developed to provide Mentor Programme Coordinators with a step-by-step guide to deliver a successful formal Mentoring Programme.

Depending on the resources available it may be better to start with an informal mentoring programme (defined below), loosely adapting aspects of the guidance that follows, or attending and/or organising a Speed Mentoring event using our Toolkit.

Photographs by Pari Naderi

Guidance for new and existing programmes

The guidance is structured to help those starting a new programme but also to provide information for those seeking to change elements of an existing programme.

By following this step-by-step guide you can be confident that you're implementing tried and tested methods of developing, managing and evaluating a formal mentor programme.

How your programme is scoped and designed will impact on the rest of the programme. It is therefore important that all the sections of the guidance are read before setting in place your programme.

1

Introduction to mentoring

What is mentoring?

Types of mentoring

2

Design and planning 10 steps

Programme management

Define your target audience

What type of programme will you offer?

Resources

What are the programme goals?

Mentor Champion

Recruitment and matching

Training and development

Delivery

Programme evaluation

3

Programme management

Management group

Management of programme information

Programme monitoring

Staff development

Marketing

Risk management

4

Operations delivery

Recruitment and selection

Training mentors and briefing mentees

Matching mentors and mentees

The mentoring relationship

Recognition and reward

5

Evaluation

Programme evaluation

Introduction to mentoring

1

Mentoring is a professional relationship that can develop between an experienced colleague, the mentor, and a junior or less experienced colleague, the mentee. Mentoring provides opportunities for mentors to offer guidance, and access to networks and contacts which will help to fulfil the mentee's potential as a productive and satisfied employee.

It is important to understand that mentoring is not a counselling or an appraisal relationship. As such the mentor should not be the mentee's immediate line manager.

Types of mentoring

Informal

Mentoring is arranged informally by both the mentor and mentee. The method of matching people is also the mentor and mentee's choice. Goals and outcomes may or may not be set, and the management of the mentoring is totally controlled by the mentor and mentee. The times, places and regularity of the meetings are casual.

Formal

Formal mentoring is part of a business development programme with an agreed structure to achieve clear goals and outcomes. The process of recruiting people for the programme should include an application process. Identifying who people are matched with should be based on an appropriate skill level of the mentor and their ability to help further the mentee's career. There should be a mentoring agreement in place which sets out the regularity of meetings, how information will be recorded and evaluated, and a clear end date for the arrangement.

E-mentoring

E-mentoring takes place on-line and does not involve regular face-to-face meetings. It can be set up in the same way as formal mentoring to enable practices and individuals who are not able to meet regularly to overcome geographical barriers.

Group mentoring

Group mentoring provides a method of support when there are not enough mentors to work with the number of mentees wanting to take part in the programme. This method can be fairly labour intensive for the mentor and requires more co-ordination to follow up work. However it can work well for the mentees as they gain greater exposure to group thinking and problem-solving.

The RIBA recommends that, where possible, formal mentoring is used. However informal mentoring, including attending Speed Mentoring events, provides both the mentor and mentee with a chance to experiment with the process without committing too much time or resources. Whichever method is chosen it is important to ensure that the relationship is conducted in a professional and supportive way.

Listen to Virginia and Lucy comparing different types of mentoring.

Design and planning

2

In order to set up a well-managed and organised programme, it is important that the key elements - who, what, where, when, and how - of the programme are clearly understood, designed and planned. Scoping out this information at the start ensures that the programme will support the mentors and mentees and meet the needs of the business.

Programme design and planning provides you with a structure of how the programme is managed, delivered, and evaluated. By planning in advance how you will co-ordinate your programme you can be sure that there will be no surprises or complications later on. Sections three, four and five will provide more detail about how to deliver your programme.

Identify the need and support

In getting to this stage of the process you have already established that there is a need for the programme. However it is important to also establish that you have the support of a senior member of staff, a Mentoring Programme Champion, and mentors and mentees who are ready to take part in the programme. Information sheets about the programme will help you gauge the level of interest..

Programme design

The programme design element will help you understand:

- how the programme will be managed
- your target audience
- the type of mentoring you will use for the programme
- where mentoring will take place
- what your desired outcomes from the programme are
- who you will need to support the programme
- how you will recruit and match mentors and mentees
- what training and development is required
- timescales for delivery
- how the programme will be evaluated

1

Programme management

The Mentoring Programme Co-ordinator will need to have strong leadership abilities, management skills and be able to manage a wide range of responsibilities. Programme management is more than the administration for the programme. The co-ordinator will also need to set out the policies and procedures for recruitment, set the matching criteria, arrange the training and development of the mentors, and the briefing of the mentees. They will modify the sample paperwork to make it fit for purpose for the practice. They will also be a sounding board for the mentors and will need to ensure that the programme is being delivered in line with the aims and objectives of the practice.

The co-ordinator should also be involved in the evaluation of the programme on a regular basis, and provide support to the Mentor Programme Champion.

2

Define your target audience

Mentees

It is important to be clear about who you want to take part in the programme. Mentoring can be used to support many groups to help them reach their full potential including:

- small or sole practitioners who are seeking to develop their business
- people seeking to return to work after a career break
- people who are underrepresented in the work place and at management levels
- students and or young people entering the profession
- anyone who is seeking advice about a career move

Mentors

Once you understand who you are targeting to be mentees for the programme, you then need to consider the people you need as mentors. Setting the criteria for mentors will help you when writing the application forms and accompanying information.

There is no reason why the mentors must reflect the range or diversity of the mentees. However, in order to understand what might be issues for, or barriers to, employment progression, it is recognised that mentors with similar professional experiences to the mentees will make the best mentors.

3

What type of programme will you offer?

As set out in the introduction, there are many different types of mentoring which are suitable for this programme: formal, e-mentoring, and group mentoring. Things to consider when designing your programme are:

Formal and e-mentoring

Do you have enough mentors interested in taking part for the number of mentees?

E-mentoring

Do the mentors and mentees have the facilities for on-line mentoring, for example video meetings using FaceTime or Skype?

Group mentoring

Do you have the facilities for group sessions and can both mentors and mentees access them without the need for excess travel?

Speed mentoring

This is a useful and informal way to introduce the idea of mentoring and providing people with a quick and inexpensive way of finding a mentor. For more information have a look at our Mentoring Toolkit.

4

Resources

Mentoring programmes can and should be inexpensive. However, you need to consider the impact of co-ordinating, monitoring and evaluating the programme. Will the Mentoring Programme Co-ordinator role form part of the person's current role, or is it an addition to their job description and therefore require additional resources? Could the role be undertaken by your training and development team to help reduce costs?

Training and development for the Mentoring Programme Co-ordinator and mentors can be delivered through access to local providers, but there is likely to be a cost implication. If you already have members of staff who have been Mentoring Programme Co-ordinators or mentors in different roles then using their skills to deliver the programme will also reduce costs.

5

What are the programme goals?

When designing your programme it's important to set out what your aims and objectives are. Setting realistic and measurable goals with a timeline for delivery is essential for a successful Mentoring Programme. Are you trying to increase diversity at a certain level of your practice? Can these be matched against a business objective, such as succession planning?

6

Mentoring Programme Champion

In order to get traction for the programme it's important that a senior partner or director is involved from the start. They need to 'champion' the programme with other senior staff, to provide support and guidance to the Mentoring Programme Champion and to actively promote the programme across the practice. Sometimes the Mentoring Programme Champion may themselves have promoted the establishment of a Mentoring Programme. In other cases the Mentoring Programme Champion and Mentoring Programme Co-ordinator may be the same person. Either way, establishing who the Mentoring Programme Champion is and identifying them for the whole practice is an important marketing and internal communications tool.

If you have a senior member of staff who has been involved in mentoring before, they will be able to provide insight into the best ways to promote and support the programme.

7

Recruitment and matching

The marketing strategy for recruiting mentors and mentees needs to be very clear about what the programme offers with regard to personal professional development, what is required of the mentors and mentees, what training will be provided, and support they can expect from the Mentoring Programme Co-ordinator.

The application forms need to provide as much information as possible for the Mentoring Programme Co-ordinator to be able to facilitate the best possible match.

Once the applications have been received the matching process can start. Two or more people should be involved in this process to provide different opinions. Possible support for this process could be sought from the Mentoring Programme Co-ordinator, HR, your Mentoring Programme Champion, or other senior staff from smaller practices who will be part of the 80:20 initiative.

Speed Mentoring events (explained in the Mentoring Toolkit) can be used to help promote the programme and to provide a more informal way of generating interest in the programme.

8

Training and development

Training will help mentors to gain confidence in their ability to support their mentees. It will provide them with the right skill set for the programme and answer the many questions they are likely to have. Training also provides an opportunity for the mentors to seek peer support.

You will need to establish when, where and how much training and support your mentors will need and to set a budget. As the programme is helping to deliver your practice's CPD, HR or your training and development department should be able to help you with this aspect of the planning.

9

Delivery

The design and planning stage will provide you with space to carefully map out the programme from start to finish. Understanding the time required to get the programme up and running, to support the ongoing work once the recruitment and matching phase has been completed, and to provide ongoing support through to evaluation will ensure that the programme is delivered in a positive, stress-free environment. This will help to increase the chance of success and an ongoing programme of delivery.

10

Programme evaluation

Before the start of the programme, it is important to set out how, when and by whom the programme will be evaluated. External help can be sought but this will also add additional cost to the programme. Internal ongoing evaluation by people known to the mentors and mentees can help to provide an environment where people can be open and honest, and therefore possibly add more value to the process.

Listen to Darren and Tayseer talk about confidence, philosophy and practical benefits of mentoring

Appendix 1: Programme design and planning check list

Appendix 2: Programme timeline check list

Programme management

3

The first steps to manage a successful programme are to set in place a clear accountable programme management system. There are many elements to this which include:

- management group
- management of programme information
- programme monitoring
- staff development
- marketing
- risk assessment

Management group

A well-supported formal programme is more likely to succeed if the programme is supported by a group. However the size and scope of your management group will be dependent on the size of your programme budget and would ideally include:

- Mentoring Programme Coordinator
- Mentoring Programme Champion
- HR representative and
- administrative support

If you are working in a large architectural practice you may be able to access additional support from:

- training and development
- IT
- communications
- a senior partner from another practice if the programme includes the 80:20 initiative
- an experienced mentor

Each member of the management team should have clear responsibilities for specific aspects of delivering and managing the scheme.

The programme management group will be responsible as a whole for:

- setting the aims and objectives of the programme to ensure they meet the business needs
- training and development
- policy and procedures
- marketing and promotion of the programme
- budget setting
- risk assessment
- resolving any strategic or programme issues
- evaluation

Management of programme information

The Mentoring Programme Co-ordinator and administrative support will have responsibility for the management of programme paperwork and for maintaining any financial records. It is important therefore to set up these controls at the start of the programme. All mentor and mentee communication should be stored and accessed in the same way as your HR information.

Programme monitoring

The collection of diversity data is also an important part of any formal programme to ensure that you are reaching all sections of your workforce. It will also help you to evaluate if the programme has reached the targeted groups set out in your programme design and planning phase.

Programme management also includes monitoring and feedback from the mentors and mentees throughout the programme. This information will form the cornerstone of your evaluation process. It is important therefore that both mentors and mentees are aware of the need to complete this work as part of the overall programme.

It is important to monitor the programme to make sure it is delivering the stated aims and objectives. If for any reason the programme is not delivering the desired business outcomes then the management group will need to address this and put in place changes to bring the programme back on track.

Staff development

Training and development of mentors and briefings for mentees can be delivered by professionals or in-house if you have the expertise. Mentor training and mentee briefings should be a minimum of two hours. Providing opportunities for both mentors and mentees to meet at least two or three times throughout the year to share their experiences will provide them with an open forum to learn from each other.

Marketing

You will need to work with your communications and/or marketing team (if you have one), to develop a marketing plan and materials for the programme. This is an important aspect of ensuring you attract your target audience and inform them of your aims and objectives. Using different methods of communication, for example email, company newsletter, screen savers, intranet postings, posters, lunch time briefings and flyers, are all good ways of getting the message out to the practice.

Creating a brand around the programme will help people to recognise marketing and promotional material and will help you stand out from the other programmes, projects and activities within the practice.

Celebrate and recognise your mentors and mentees throughout the programme. Ask them to talk and write about their experiences, as this will help to attract new people onto the programme and demonstrate that the practice is backing the programme.

Consider adding information to your website to promote the practice's commitment to the programme, making you stand out from the crowd and attracting people to join.

Another aspect to consider when marketing the programme is how you will promote the practice's commitment to the programme; consider adding information to your website, which in turn can help to attract people to join the practice and make you stand out from the crowd.

Risk management

A risk management policy is advisable to ensure the management group are aware of the likely risks and have strategies in place to address risks within the programme.

A written code of conduct for both the mentors and mentees will help to reduce instances of misunderstandings.

Areas to consider in the code are:

- where and when meetings take place
- regularity of meetings
- methods of contact
- use of social media
- confidentiality and privacy
- timescales for the programme – what happens next
- working towards the agreed aims and objectives
- gifts and hospitality

The risk management policy also needs to include:

- complaints procedures – this should follow your HR policy, but be aware that if you're working with other practices or sole practitioners they may have a different policy
- a process for the termination of agreements

Appendix 3: Checklist for programme management

Operations delivery

4

Section four provides you with the information you need to run your programme effectively, covering the following areas:

- recruitment of mentors and mentees
- training mentors and briefing mentees
- matching mentors and mentees
- the mentoring relationship
- recognition and reward

This practical section will give you the confidence that you have all the information you need to run an effective and successful programme.

Recruitment and selection

Recruiting mentors and mentees who will add quality to your programme is more important than quantity. Your recruitment plan should focus on ensuring you gather enough information about the mentors and mentees to enable you to match them and deliver against your organisational aims and objectives.

Whether you're running an informal or formal mentoring programme the application process should provide the applicants with a brief description of the programme, the expected aims, objectives and outcomes as well as details of the training, support and time commitments. Use the information and audio clips on the RIBA Mentoring Hub (architecture.com/mentoring) to provide an overview for any prospective mentor and mentee.

The mentor application form could include the following:

- a profile of the applicant – role, interests, experiences
- qualifications
- areas they feel they can provide support to the mentees
- past experience of mentoring
- why they want to become a mentor
- preferred location
- contact details

The mentee application form could include the following:

- a profile of the applicant – role, interests, experiences
- qualifications
- areas they feel a mentor can help them develop
- goals and aspirations
- why they want to join the programme
- work location
- contact details

You will need to recognise that not all mentors or mentees will match your planned outputs. Put in place a process to inform them that they have been unsuccessful or work with them to refine their expectations. It is important to provide feedback at this stage so the programme does not generate any negative perceptions in the practice.

Once you have recruited your mentors and mentees you should send them a letter, welcoming them to the programme and setting out the next steps. Having a standard template will save you time and will ensure everyone receives the same information.

It is important that participation in the programme is voluntary. Line managers can encourage people, but it needs to be their choice. The right marketing plan should result in people coming forward because they see the benefits to their careers and for themselves.

The screening process needs to identify prospective mentors who will not be suitable for the programme. There are no set down reasons why someone may not be suitable, but you need to be aware of the following:

- people who do not have enough time to commit to the programme
- anyone applying because they feel it gives them status or promotion prospects, rather than what they can bring to the programme
- people who are not open to new ideas or keen to learn themselves
- people more interested in what the mentee can do for them
- people who do not have the skills which match your programme needs

If you're not sure that a mentor is suitable, then offer them an interview so you can gain more of an insight into why they want to join the programme.

Selecting mentees is very different to the selection of mentors. They may not be as clear about what they need or expect from the programme. However as long as they are willing to take part and demonstrate the right attitude and commitment they should be encouraged to participate.

Training mentors and briefing mentees

Providing training support for mentors and mentees provides them with an opportunity to meet with other participants in an informal setting. The management group should also attend the sessions to help establish their commitment to the programme from the start.

The training and briefings could include the following:

- an overview of the programme
- an outline of the programme aims and objectives
- details about how mentors and mentees will be matched
- details about the commitment required, including time, frequency and the need to be flexible
- benefits and rewards
- programme policy and procedures
- what is expected of the mentor / mentee
- programme paperwork
- feedback and evaluation process

The mentor training will aim to help the mentors to:

- become more skilled in developing their role
- understand the challenges their mentees may be facing
- provide advice on goal setting and problem solving
- understand the impact they will have on their mentee
- develop a professional mentor relationship
- manage expectations
- understand what they can and can't do in their role

The mentee briefing will help to:

- address any concerns they have
- discuss the expectations of the mentees
- explain what the mentors can and cannot do
- help them to start to think about their own goal-setting
- inform them about what to do if the programme is not working out

Listen to Anna and Tara talk about benefits of mentoring to the profession and society

Matching mentors and mentees

Understanding what makes a successful mentoring relationship is fundamental in the matching process. Areas to consider are:

- age
- gender
- ethnicity
- matching skills with areas of development
- life experience
- location
- working practices – i.e. part-time or flexible working
- personality
- interests

Once a match has been made both parties should arrange a meeting in the practice to give them an opportunity to discuss how they will work together. If either person does not feel that the match is right for them they should be given the opportunity to decline the match without it affecting their participation in the programme.

Before arranging another match the Mentoring Programme Co-ordinator should meet with both parties to establish why they thought that the match was not suitable, and if possible try to work out the differences without causing issues in the workplace. If either person still feels the match is not suitable then a different match will need to be found.

Before starting the official programme, both mentor and mentee need to sign an agreement which sets out their commitment to the programme and how they will conduct themselves.

The mentoring relationship

Once the match has been made it's important that both the mentor and mentee take ownership of their participation in the programme. They will need to agree regularity and location of meetings. These should be either in the practice or off site during working hours.

The regularity of meetings will be determined by the availability of both parties. However, the meetings should take place at least once a month to start with to ensure the mentee is receiving the right amount of support. Meetings can become bi-monthly or quarterly if required, with contact by phone or email in between. The mentor and mentee will determine the final mix of activities for the programme, but they should include:

- goal-setting
- documentation review
- feedback
- evaluation and closure

Recognition and reward

Both the mentor and mentee need to know that the practice recognises the work required to make the programme a success. It is worth planning events to promote and publicise the success of the programme by involving mentors and mentees in this process. Activities could include:

- an annual lunch to celebrate the programme
- encouraging both mentors and mentees to talk about their experience at practice meetings, lunch time briefings, through the company intranet, magazine etc
- featuring mentors and mentees on your website pages
- actively promoting the programme by submitting nominations for national recognition awards

Listen to Anna and Tara reflect on their mentoring relationship and how it has affected them both

Appendix 4: Guidelines to increase uptake of the programme

Appendix 5: Sample applications

Appendix 6: Sample mentoring contract

Appendix 7: Sample code of conduct

Appendix 8: Sample agreement

Evaluation

5

Programme evaluation

A formal mentoring programme should include an evaluation at the end of the programme to:

- increase understanding of the effectiveness of the programme in relation to the goals set at the start of the programme
- provide useful information for the running of future programmes
- provide both mentors and mentees with a method to feedback and evaluate their performance

The criteria for programme evaluation should be clearly set out at the start to ensure everyone knows what is expected of them and how success will be measured. It is important that any evaluation process includes a form of reporting which can then be used to establish the effectiveness of the mentoring programme for the practice, mentors and mentees.

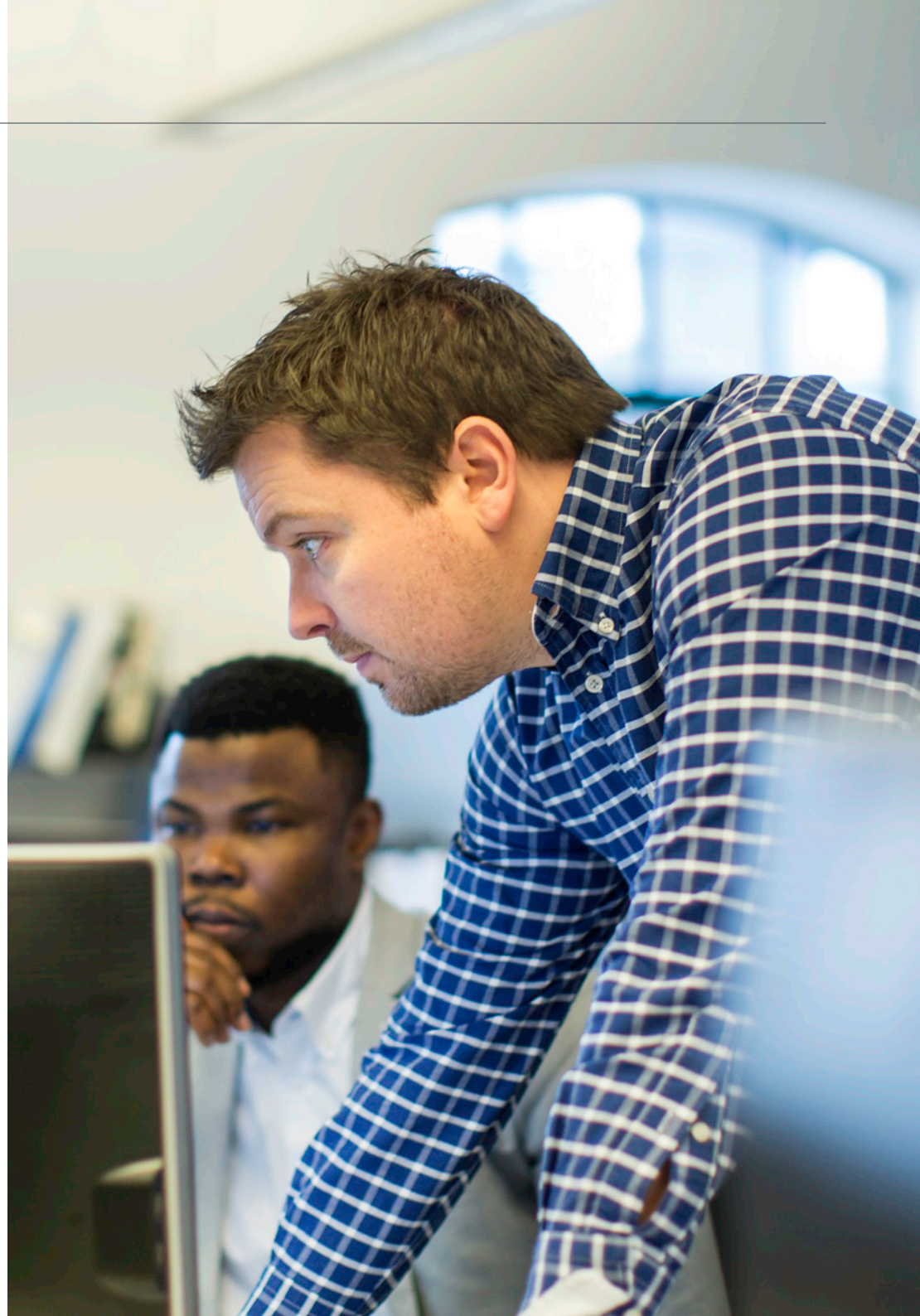
There are a number of different types of evaluation model which can be used – from simple feedback forms throughout the programme to external evaluation carried out by a third party.

The chosen method will depend on the number of people who took part in the programme and the available time and resources of the practice.

Useful measures of the programme's success, which could be built into a final report could include:

- staff satisfaction surveys
- staff retention rates before and after the programme
- staff appraisals
- interest in taking part in future programmes
- number of successful matches which lasted over the programme duration
- number of mentees who choose to become mentors
- business improvements / contracts won

In addition to recognising and supporting the programme throughout its duration, it is just as important to celebrate and promote the success of either an informal or formal programme on conclusion.



Appendices

Appendix 1: Mentoring Programme Design and Planning

Goals and outcomes from the programme

- ☐ What are the programme goals and outcomes?
- ☐ How will the company evaluate if the programme goals are being achieved?
- ☐ What processes need to be in place if goals are not being achieved?

Programme management: people and resources

Mentor Champion

- ☐ What skills and commitment will be required for a Mentoring Programme Champion?
- ☐ How will the Mentoring Programme Champion be identified from the company management team?
- ☐ Will the Mentoring Programme Champion require training and support for the role?
- ☐ How will the Mentoring Programme Champion support and promote the programme?

Mentoring Programme Co-ordinators:

- ☐ Who will identify and recruit Mentoring Programme Co-ordinators?
- ☐ What skills and responsibilities will they need for the role?
- ☐ How will the Mentoring Programme Co-ordinator's time be managed within their current role?
- ☐ What support will the Mentoring Programme Co-ordinators require from management and HR?
- ☐ What resources will Mentoring Programme Co-ordinators need to run the programme?

Marketing and promotion

- ☐ What budget will be allocated to the programme?
- ☐ How / who will manage the budget?
- ☐ Mentoring Programme Co-ordinators to work with communications and HR teams to reach workforce;
- ☐ Set the timeline for launch of programme; and
- ☐ What process will be in place to promote and recognise the achievements of the programme while it is running and on completion?

Target audience

Mentees

- ☐ Who is the company targeting for the programme?
- ☐ How will the company ensure fair access to the programme for all staff at all levels?
- ☐ How many mentees is the company seeking to recruit to the programme?
- ☐ How much time will mentees have to take part in the programme?
- ☐ How will mentees be recruited and what training do they require?
- ☐ Set aims and objectives for mentees in the programme.

Mentors

- ☐ What skill set is required to become a mentor?
- ☐ How will mentors be recruited and selected for the programme?
- ☐ How much time will be required to be a mentor?
- ☐ How will mentors be trained to deliver the programme?
- ☐ What will be expected of mentors on the programme?
- ☐ How will the mentors be evaluated?
- ☐ How will mentoring help CPD?

Matching

- ☐ How will mentees and mentors be matched?
- ☐ Process in place if matching does not work for either party.

Types of mentoring

Determine the type of mentoring that meets both the business and programme objectives.

- ☐ Informal – will this be managed, resourced and evaluated?
- ☐ Formal – resources required
- ☐ E-mentoring – access to resources and equipment
- ☐ Group mentoring – facilities and skills required
- ☐ Where and how will mentoring take place?
- ☐ Formal, e-mentoring and group mentoring programmes should include details of how often mentoring will take place
- ☐ How will time to be allocated for mentees and mentors to take part in the programme?

Monitoring and evaluation

- ☐ Define the nature of the programme and the resources required to support, monitor and evaluate;
- ☐ Who will monitor the programme and how often?
- ☐ Establish reporting and recording methods, feedback processes and resources;
- ☐ Establish the method of evaluation for the programme
  - Independent evaluation
  - Feedback from mentees and mentors
  - Line management / appraisal
- ☐ Evaluation report to management team or board
- ☐ Celebrate success and achievements

Training and development

- ☐ Establish who needs training – Mentoring Programme Champion, Mentoring Programme Co-ordinator, mentors, mentees
- ☐ Set a training and development budget
- ☐ Internal or external trainers required
- ☐ Consider 'train the trainers' to develop staff and save costs

Timescales for delivery

- ☐ Decide how long the will programme run – 6, 12 ,18 or 24 months, or different timescales for delivery
- ☐ Check the programme timeline and ensure resources and support is in place for the duration of the programme

Programme closure

- ☐ How will the programme be closed at the end of each period of time?
- ☐ How will mentees and mentors be supported throughout the closure process?
- ☐ Will mentees be encouraged to become mentors?

Appendix 2: Programme timeline check list

The following is a timeline for a 12-month formal mentor programme

Task	Description	Time Period
Planning		**Pre-Programme**
Pre-Planning	Conduct needs assessment of the business.	
Pre-Programme Development	Management team agree goals of programme	
Structure the Mentoring Programme	Determine the purpose, type of mentee needs, goals, mentoring model, and structure of the programme	
	Recruit / appoint and provide training for the Mentoring Programme Co-ordinators	
	Recruit / appoint and provide training for the Mentoring Programme Champion	
	Develop and write policy and processes for the programme, including selection criteria, recruitment process, monitoring, review, evaluation, and risk assessment.	
	Set programme budget	
	Develop marketing campaign	
Marketing and promotion		Month 1
Marketing campaign	Marketing campaign is launched and actively promoted by Mentoring Programme Champion, HR, Communications Team, Mentoring Programme Co-ordinator.	
Mentor and Mentee Recruitment and Selection		Month 1
Mentor and Mentee Recruitment	Identify potential sources for recruitment	
	Run recruitment campaign	
	Interview mentors and mentees	
Mentor/Mentee Selection	Select people for the programme	
Training		Month 2 / 3
	Identify trainers	
	Mentor and mentee training	

Task	Description	Time Period
Matching		Month 3
	Match mentors and mentees on the basis of information from application (gender, goals, career interest, skills).	
	Formal opening of the programme that allows for the first mentor/mentee meeting.	Month 3
Mentor/Mentee Activities	Arrange for mentors and mentees in the programme to attend programme review activities	Quarterly
	Mentoring Programme Champion meets with mentors and mentees as part of the review and promotion process	Quarterly
Ongoing support		Months 3-12
	Mentoring Programme Co-ordinator assist mentors/ mentees with review process and arrange any additional training	Throughout the programme.
Feedback from Mentors and Mentees	Mentoring Programme Co-ordinator receive mentors and mentees programme reviews to ensure the programme is on track to deliver the business and programme objectives	Quarterly
Mentor Support Sessions	Mentor support meetings.	Varies according to the programme size
	Mentoring Programme Co-ordinator monitor mentor/ mentee relationships.	Bi-monthly
Recognition		Annually at a minimum
	Celebrate and recognise the accomplishments of the programme and mentors'/mentees' contributions.	
Closure & Evaluation		Month 12
	Determine what outcomes to measure and evaluate.	During planning phase
	Measure outcomes and conduct evaluation.	Annually
	Close programme	
	Review programme progress and refine as needed.	Annually
	Reflect on and disseminate findings.	Annually

◀ Contents

Appendix 3: Checklist for programme management

Management Group

- Mentoring Programme Champion
- Communications and HR / Training representatives
- Budget / Finance programme controller
- Lead Mentoring Programme Co-ordinator
- Mentor with past experience
- IT support for e-mentoring programmes

Area of responsibility	Lead person	Key Tasks	Timescale
Set aims and objectives of the programme		Align programme with business objectives	
Training and development requirements		Set the level of training and development required for the programme	
Recruitment and Selection		Responsible for the management of recruitment and selection policy and process	
		Collection and reporting diversity data for the programme	
Policy and Procedures		Programme policy and procedures for Information Sharing Recruitment and Selection Conflict Resolution Reporting Data collection Risk Assessment Code of Conduct	
Marketing and promotion		Production of all marketing and promotional material and methods of dissemination	
Set budget and report progress		Marketing Training Materials Events	
Review progress and reports		Review and report mentors and mentees progress;	
		Monitor programme to ensure it is delivering the business and programme objectives	
Appoint evaluation team / person		Annual review of delivery of programme objectives and outcomes Reporting to the board / management team	
Support the Mentoring Programme Co-ordinator		Admin support Management support Day-to-day programme support	

Appendix 4: Guidelines to increase uptake of the programme

Marketing Campaigns

Focus the marketing in areas where people will find the information easily

- In-house media and intranet
- Profile the programme and case studies in company magazine or newsletter
- Advertise the programme through company screen savers
- Advertise the programme using video case studies via in-house TVs
- Ask people who have been involved in mentoring or have been mentees to talk at planned events
- Include opportunities for people to meet and talk to mentors and mentees at lunch-time seminars
- Put on events to promote the programme in canteen or break out areas – take the programme to the people
- Run mentoring events to promote and celebrate the programme

Marketing methods

- Ensure any marketing stands out from the other company activities – think outside the box
- Use plain English and be clear about what you are promoting
- Identify the benefits of being involved – focus on the positives
- Bring the programme to life by using case studies
- Sign people up at events and follow up quickly so they do not lose interest
- Include the mentoring programme in company awards / reward schemes

Appendix 5: Sample applications – mentor application form

Name: _____

Email address: _____

Internal extension: _____

Emergency contact number: _____

Department/Role: _____

Previous experience in practice and relevant personal experiences:

_____

_____

_____

Skills and Interests:

_____

_____

_____

Areas of practice and professional expertise:

_____

_____

_____

Training and management qualifications:

_____

_____

_____

_____

_____

_____

Please outline any previous experience of mentoring.

E.g. Were you involved with a formal or informal mentoring scheme? Was it group or individual? Was it in practice or student mentoring? How long did the mentoring relationship last?

_____

_____

_____

_____

_____

_____

Why do you want to become a mentor?

Please include how you feel it fits in with your professional development and make mention of anything that has come up in your appraisals or reviews.

_____

_____

_____

_____

_____

_____

Where would you prefer to meet your mentor?

E.g. in practice or outside?

_____

How did you hear about the mentoring scheme?

E.g. internal communications, the intranet, from previous participants?

_____

Ethnicity

Please select your ethnic origin

Asian or Asian British

☐ Bangladeshi ☐ Indian
☐ Pakistani ☐ Chinese
☐ Any other Asian background

Black or Black British

☐ African ☐ Caribbean
☐ Any other Black background

White

☐ British/Scottish/English/Welsh/ Northern Irish/Cornish
☐ Irish ☐ Gypsy or Irish Traveller
☐ Any other White background

Mixed

☐ White and Asian ☐ White and Black African
☐ White and Black Caribbean
☐ Any other mixed/Multiple Ethnic Group

Other Ethnic Group

☐ Arab ☐ Any other Ethnic group

☐ **Prefer not to say**

Gender

Please select the gender you most identify with

☐ Male ☐ Female

Sexual orientation

Please select the gender you most identify with

☐ Lesbian ☐ Bisexual
☐ Gay ☐ Heterosexual
☐ Prefer not to say

Age

☐ 20 -30 ☐ 30-40 ☐ 40-50
☐ 50-60 ☐ 60-70 ☐ 70+

Disability

Do you consider yourself disabled?

☐ Yes ☐ No ☐ Prefer not to say

If yes, which one of the following best describes your disability?

☐ Manual dexterity or coordination
☐ Mobility ☐ Mental Health
☐ Speech ☐ Learning Difficulties
☐ Hearing ☐ Visual
☐ Other, please specify

_____

Religion

☐ Atheist ☐ Buddhist
☐ Christian all denominations
☐ Hindu ☐ Jewish
☐ Muslim ☐ Sikh
☐ Other ☐ Non-religious
☐ Prefer not to say

Caring responsibilities

Do you care for a child/children, someone with disabilities or an elderly person?

☐ Yes ☐ No ☐ Prefer not to say

Social Mobility

If you went to University/Polytechnic etc. were you part of the first generation of your family to do so?

☐ Yes ☐ No ☐ Prefer not to say
☐ Did not attend university/polytechnic etc.

Appendix 5: Sample applications – mentee application form

Name: _____

Email address: _____

Internal extension: _____

Emergency contact number: _____

Department/Role: _____

Previous experience in practice and relevant personal experiences:

_____

Skills and Interests:

_____

Areas of practice and professional expertise:

_____

Qualifications:

Please provide details of your professional qualifications and outline any professional training you have undertaken

_____

Please outline any previous experience of mentoring.

E.g. Were you involved with a formal or informal mentoring scheme? Was it group or individual? Was it in practice or student mentoring? How long did the mentoring relationship last?

_____

What areas do you feel a mentor can help you develop?

Please include how you feel it fits in with your professional development and make mention of anything that has come up in your appraisals or reviews. Please outline your goals and aspirations.

_____

Where would you prefer to meet your mentor?

E.g. in practice or outside?

_____

How did you hear about the mentoring scheme?

E.g. internal communications, the intranet, from previous participants?

_____

Ethnicity

Please select your ethnic origin

Asian or Asian British

- ☐ Bangladeshi
- ☐ Indian
- ☐ Pakistani
- ☐ Chinese
- ☐ Any other Asian background

Black or Black British

- ☐ African
- ☐ Caribbean
- ☐ Any other Black background

White

- ☐ British/Scottish/English/Welsh/Northern Irish/Cornish
- ☐ Irish
- ☐ Gypsy or Irish Traveller
- ☐ Any other White background

Mixed

- ☐ White and Asian
- ☐ White and Black African
- ☐ White and Black Caribbean
- ☐ Any other mixed/Multiple Ethnic Group

Other Ethnic Group

- ☐ Arab
- ☐ Any other Ethnic group

☐ **Prefer not to say**

Gender

Please select the gender you most identify with

- ☐ Male
- ☐ Female

Sexual orientation

Please select the gender you most identify with

- ☐ Lesbian
- ☐ Bisexual
- ☐ Gay
- ☐ Heterosexual
- ☐ Prefer not to say

Age

- ☐ 20 -30
- ☐ 30-40
- ☐ 40-50
- ☐ 50-60
- ☐ 60-70
- ☐ 70+

Disability

Do you consider yourself disabled?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

If yes, which one of the following best describes your disability?

- ☐ Manual dexterity or coordination
- ☐ Mobility
- ☐ Mental Health
- ☐ Speech
- ☐ Learning Difficulties
- ☐ Hearing
- ☐ Visual
- ☐ Other, please specify

_____

Religion

- ☐ Atheist
- ☐ Buddhist
- ☐ Christian all denominations
- ☐ Hindu
- ☐ Jewish
- ☐ Muslim
- ☐ Sikh
- ☐ Other
- ☐ Non-religious
- ☐ Prefer not to say

Caring responsibilities

Do you care for a child/children, someone with disabilities or an elderly person?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

Social Mobility

If you went to University/Polytechnic etc. were you part of the first generation of your family to do so?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say
- ☐ Did not attend university/polytechnic etc.

Appendix 6: Sample mentoring contract

DISCLAIMER: The following sample contract was adapted from 'Get Mentoring' (getmentoring.org/mentoring-resources) under the Creative Commons License. Whilst the RIBA recommends the use of the sample mentoring contract as being a fair and reasonable expression of terms between the parties, the RIBA can accept no liability in respect of any use of the sample mentoring contract. Parties must therefore take independent advice if necessary before entering into any agreement and if any dispute arises in relation to any agreement the parties must settle the dispute between them in accordance with the terms of the agreement without reference to the RIBA.

DEED dated:

PARTIES

(1) [NAME OF BUSINESS] of [ADDRESS OF MENTEE] ("**Mentee**");

(2) [NAME OF MENTOR] of [ADDRESS OF MENTOR] ("**Mentor**"); and

(3) MENTORING ORGANISATION

BACKGROUND

(A) <MENTORING ORGANISATION> has a network of volunteer mentors. The Mentor is one such volunteer, and has skills and/or experience relevant to the requirements of the Mentee.

(B) The Mentee wishes to access the Mentor in order to gain guidance and support for its development.

(C) The parties agree that the relationship between them shall be as set out in this agreement.

IT IS AGREED as follows:

1. The Services

1.1 The Mentor has agreed to provide mentoring services to the Mentee, on the terms of this agreement. The MENTORING ORGANISATION'S involvement has been limited to identifying the Mentor, introducing the Mentor to the Mentee and the monitoring and evaluation of progress. The MENTORING ORGANISATION will not provide any further services to the Mentee under this agreement.

1.2 The services will consist of meetings and/or phone calls and/or email or other written communications between the Mentor and the Mentee from time to time, the exact content, frequency and duration of which will be as agreed between the Mentor and the Mentee.

1.3 The Mentor shall not at any time be obliged to provide or continue to provide any mentoring services to the Mentee, but if and to the extent that it does so, such services will be provided free of charge.

1.4 The Mentee shall not at any time be obliged to request or receive mentoring services from the Mentor.

1.5 The existence of this agreement shall not prevent the Mentor and the Mentee entering into a new and separate agreement whereby the Mentor provides services to the Mentee on a fee-paying basis, but if such an agreement is entered into, it shall replace and supersede this agreement, which will automatically terminate.

2. Liability

2.1 The Mentee shall not at any time be obliged to act on any information, suggestion, advice or guidance given by the Mentor as part of the services, but if and to the extent that it does so, it shall do so at its own risk. The Mentee hereby unconditionally and irrevocably waives any rights of action it may have as against the Mentor in relation to any such information, suggestions, advice or guidance.

2.2 The Mentee is advised to take independent financial, legal or other appropriate professional advice before acting on any information, suggestion, advice or guidance given by the Mentor.

2.3 The Mentee acknowledges that any services provided by the MENTORING ORGANISATION and the Mentor pursuant to this agreement are provided free of charge and in good faith. Neither the MENTORING ORGANISATION nor the Mentor will be liable to the Mentor or to any third party for any loss, damage, costs or liabilities suffered as a result of this agreement, the existence of the relationships between the parties or the services provided. Nothing in this clause shall limit or exclude any liability for death or personal injury, or which results from fraud.

2.4 The MENTORING ORGANISATION is not (and the Mentee and the Mentor acknowledge that the MENTORING ORGANISATION is not) liable for the services provided by the Mentor or for any acts or omissions of the Mentor.

3. Term

3.1 This agreement will continue in force for twelve months or until terminated by any party by written notice to the others sent to the addresses given above.

3.2 While this agreement is in force, the Mentor and the Mentee will not either directly or through any intermediary enter into any other contract or arrangement as between them.

4. Confidentiality

4.1 The Business and the Mentee hereby permit the MENTORING ORGANISATION to refer to the Mentee, the Mentor and the existence of the arrangement contemplated by this agreement in any publication or material it may use to publicise and promote the work of the MENTORING ORGANISATION.

4.2 Neither the Mentee nor the Mentor may use or mention the MENTORING ORGANISATION's name, logo or any other intellectual property of the MENTORING ORGANISATION in any of their publicity materials or in any announcement, without the prior written consent of the MENTORING ORGANISATION.

4.3 The Mentee and the Mentor will keep in strict confidence the existence and content of this agreement and the Mentee shall keep confidential all information, suggestions, advice or guidance provided by the Mentor to it as part of the services.

All parties will keep in strict confidence all and any information of a confidential nature which it obtains about either of the other parties as a result of the arrangements contemplated by this agreement. This clause shall not apply in relation to any information that is already available in the public domain other than as a result of a breach of this clause by any party.

5. Miscellaneous

5.1 Nothing in this agreement is intended to, or shall be deemed to, constitute a partnership or joint venture of any kind between any of the parties, nor constitute any party the agent of another party for any purpose.

5.2 A person who is not a party to this agreement shall not have any rights under or in connection with it.

5.3 This agreement shall be governed by, and construed in accordance with, English law, and the parties irrevocably submit to the exclusive jurisdiction of the courts of England and Wales.

5.4 Clauses 2, 4 and 5 shall survive termination of this agreement.

This deed is delivered by each party when (and shall not have effect until) it is dated.

SIGNED as a DEED by [**MENTEE**]
in the presence of

Witness:

Signature _____

Name _____

Address _____

_____

Occupation _____

SIGNED as a DEED by [**MENTOR**]
in the presence of

Witness:

Signature _____

Name _____

Address _____

_____

Occupation _____

SIGNED as a DEED by [**NAME OF INDIVIDUAL**]
for and on behalf of **THE MENTORING ORGANISATION** in the presence of

Witness:

Signature _____

Name _____

Address _____

_____

Occupation _____

Appendix 7: Sample code of conduct

Scope

A mentor does not give advice, rather helps the mentee to weigh up situations, through a process of reflection, questions, challenge and feedback allowing the mentee to come to a decision themselves. The mentor will conduct themselves with dignity and will act in a way which respects diversity and promotes equal opportunities.

Mentoring code

- The mentor's role is to respond to the mentee's needs and agenda; it is not to impose their own agenda.
- Mentors will agree with the mentee how they wish the relationship to work adopting the most appropriate level of confidentiality
- Mentors will be aware of, and adhere to any current legislation relating to activities undertaken as part of the mentoring service.
- The mentee should be made aware of their rights and any complaints procedures.
- Mentors and mentees will respect each other's time and other responsibilities, ensuring they do not impose beyond what is reasonable.
- The mentor will ensure the mentee accepts increasing responsibility for managing the relationship; the mentor will empower them to do so and will promote the mentee's autonomy.
- Either party may dissolve the relationship at any time throughout the period of the mentoring relationship.
- The mentor will not intrude into areas the mentee wishes to keep private until invited to do so. They should, however, help the mentee to recognise how other issues may relate to these areas.
- Mentors will open and truthful with themselves and their mentee whilst participating in the mentoring relationship
- Mentors will share the responsibility for the smooth winding down of the relationship with the mentee, once it has achieved its purpose – they must avoid creating dependency.
- The mentoring relationship should not be exploitative in any way, neither may it be open to misinterpretation.
- Mentors should never work beyond the bounds of their capability, experience and expertise to the point where they do not feel confident in providing the mentee with proper support. Where appropriate, mentors should seek advice or refer mentees to another point of contact or enterprise support professional.
- The confidentiality of the client remains paramount at all times. At no time will a mentor disclose any part of the relationship to any person whosoever, without the explicit agreement of the client. Any notes or other records of mentoring sessions shall remain, at all times, the property of the client. They may, for convenience, be retained by the mentor but may be requested by the client at any time.
- Mentors have a responsibility to highlight any ethical issues (such as conflicts of interest) that may arise during a mentoring relationship at the earliest opportunity.
- Mentors should not attempt to do the mentees job for them - the mentee has the ability and the potential, the mentor's job is to help them realise it.
- Mentors will maintain their professional competence through participation in continuous professional development

Appendix 8: Mentoring Agreement

The mentoring partners listed below agree to enter into a mentoring relationship and to keep to the conditions of this mentoring agreement.

Mentee Name:

Signature: _____

Date: _____

Mentor Name:

Signature: _____

Date: _____

- All parties agree to protect each other's privacy and abide by the Mentoring Code of conduct and the agreed boundaries of the mentoring relationship.
- All parties must abide by and appreciate the confidentiality required in this programme.
- The Mentor will attend the 'Introduction to Enterprise Mentoring' workshop and engage in appropriate skills development where required.
- The Mentee will take direction of the relationship with meetings taking place at mutually agreed dates and times.
- The recommended time for participation in the programme is twelve months however all parties must be flexible with this.
- If either party wishes to leave the programme before this time they must advise the Mentor Manager
- All parties must understand that they must show their full commitment, in their respective roles, to the programme to gain the most from it.