



Mentoring Resources



THE UNIVERSITY
of EDINBURGH



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Mentoring Connections at the University of Edinburgh

The University of Edinburgh Mentoring Connections programme provides staff with time and space to meet with a mentor/mentee to talk through a variety of issues that affect them at various stages of their career and development, for example work life balance, career development, or promotion paths.

Mentoring Connections is for staff in all areas and at all stages of their career. We particularly encourage applications from Female (Academic) Staff; New International Staff; New and Aspiring Leaders in the University; or Staff who through their Annual Review process, have identified the need for mentoring around career/ professional development.

The Mentoring Connections programme is one of the strategies to address a number of key challenges identified in the University Strategic Plan; as a result evaluation of the impact of this approach is built into the programme. Confidentiality will be protected throughout the evaluation process.

This toolkit aims to help support mentors and mentees in building their relationship. It includes information as well as resources to help you in your mentoring partnerships. As well as the toolkit, the HR team run a workshop to introduce the structure of the mentoring relationship as well as provide an opportunity for people to practice those skills. A further set of videos covering topics relating to the mentoring relationship are available on our website under the section called "Helpful Resources".

As well as this toolkit, there is a wealth of information on the Internet about Mentoring. In particular all staff have access to the Online Development Toolkit which has some resources on mentoring as well as information on the topics that could come up in the discussions.

Please get in touch at any time if you have a question or concern regarding your mentoring, we are always happy to help.

Mentoring Connections Team

LearningandDevelopment@ed.ac.uk

General information on the mentoring process after matching

- Once matched, we ask that Mentors take the lead on setting up the first mentoring meeting
- If a mentee has not heard from their mentor, they may want to try getting in touch via email or telephone. If there is no response, please get in touch
- There is no time limit on this relationship – it may last 6 months, a year or longer. Again, this is down to the individuals involved and we ask that you agree and review your partnership, goals and expectations every 2-3 meetings
- The frequency of meetings is also up to both parties to agree. It may be useful to diary in time to meet every 4-6 weeks at the beginning of the relationship to establish rapport and to set the direction for the relationship. If both the mentor and the mentee expectations are not aligned this should be discussed and if possible a compromise reached. If this isn't possible get in touch
- There is a 'no fault' finishing clause in the event that the Mentor or Mentee find this partnership doesn't work for them – you can both be re-matched if appropriate. Please get in touch if you are in this situation
- If at any time you have a question or concern about your mentoring partnership or your role we are happy to help
- You will be contacted to complete an evaluation at 6 months and 1 year. We will also contact you at other times to send on information relating to additional resources or related development options
- When your partnership is ended, please contact us to ensure we update our records
- We try to re-match experienced mentors and will always ask if you are willing to continue as a mentor. Mentees may want to consider getting back involved as a mentor – if interested please update us when you get in touch

Contact us: LearningandDevelopment@ed.ac.uk

What are the Benefits of Mentoring?

For the Mentees:

- Increased self-awareness and self-discipline
- Support in transitions
- Provided with sounding board and feedback
- Accelerated training and development
- Expanded personal network and other learning resources
- Experience of different options/paths
- Increased self-confidence and self-esteem
- A safe place to try out ideas
- Access to information about how the organisation works
- A source of stretch and challenge

For the Mentors:

- Personal fulfilment from investing in others
- Communication, management and coaching skills
- Enjoyment of a rewarding challenge
- Feeling “valued” as a role model
- Stimulation of their own learning – a two way learning relationship
- Improvement of own processes and performance
- Insights into relationship with own team
- Having an opportunity to be challenged
- Having an opportunity to take time out and reflect
- Renewed focus on own career and development

For the Line Manager:

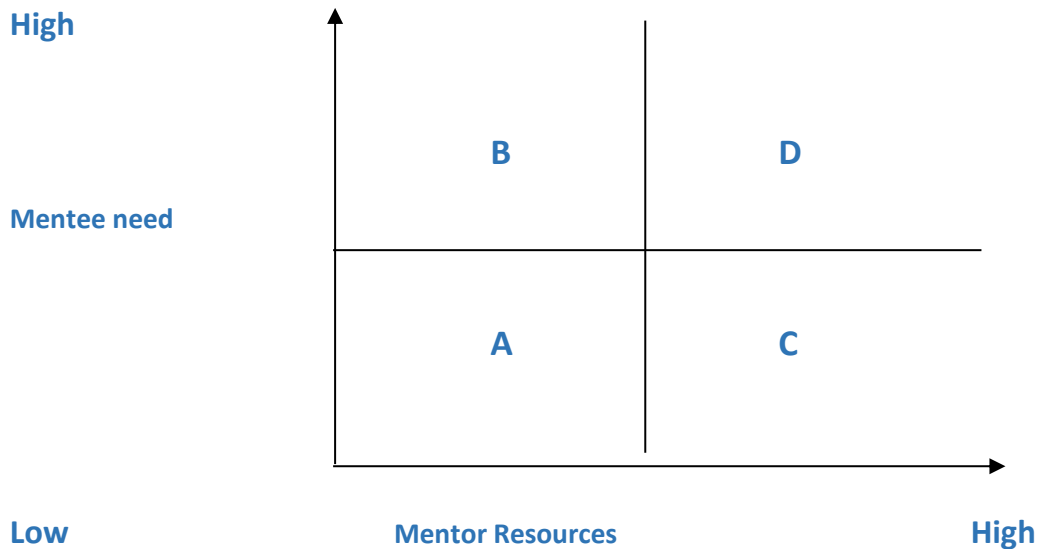
- The mentee’s performance improves
- Potentially a better relationship with the mentee
- Mentee’s relationship with the team improves
- Shared responsibility for developing the mentee
- Another role model for the mentee

For the Organisation:

- Employee retention and improved recruitment
- Improved morale, motivation and relationships
- Helps build a learning culture
- Improved implementation of change
- Improved communication
- Releases potential and improves productivity
- Sharing of tacit knowledge
- Cost effective, mutual development
- Creates talent pool for succession planning.

The Need for Mentoring

Mentoring can range from a spur-of-the-moment intervention to an intense long-term relationship. The mentee's needs and the mentor's resources vary over time, reflecting the complexities of life, and it is important to assess where you are at the moment. Conditions and interests need to be reappraised from time to time.



Quadrant A: The mentor's resources and mentee's needs are low, spontaneous, or occasional. Very short-term interventions may be adequate and satisfying to both parties.

Quadrant B: The mentee's need is high and the mentor's resources; time, skills, etc are low. Helping the mentee find a more appropriate mentor or professional help may be appropriate.

Quadrant C: The mentor's resources are substantial, but the mentee's needs are low. Occasional help may be all that is needed, and the mentor may have time and talent available for helping others.

Quadrant D: The mentee's need is high and the mentor's resources are abundant. The potential exists for an intense and productive relationship.

The mentor and mentee's willingness, readiness and appropriateness need to be judged according to the individual situation. A very willing mentor trying to work with a mentee who perceives little need for help is inappropriate. Similarly, a needy mentee and overloaded mentor may not work well together.

Rapport Building

Rapport building is all about working easily together. You do not need to be great friends, but have sufficient willingness, respect and growing trust to want to work together. Below are some easy steps to help you work towards this process:

Steps to Rapport Building:

- Have at least one clear developmental goal to work on together. This will give your relationship a clear purpose and structure. You will find it easier to like and respect another individual if you are working on something of importance to you.
- You will need to share or acknowledge at least, the validity of each other's values.

- Start each mentoring or email by re-establishing rapport. Use normal social trivialities to help you both relax, and then go into the issues to be explored. Remember the mentor has a lot to do! A good mentee will work hard at this process also. It is not a one-sided responsibility.
- The five characteristics of rapport are: trust, focus, empathy, congruence and empowerment, and both the mentor and mentee can work together on these characteristics.

The mentor needs to consider congruence and empowerment in particular:

Congruence – Does the mentor acknowledge and accept the mentee’s goals?

Empowerment – Is the mentor’s help aimed at helping the mentee to be independent as soon as possible?

Creating the Physical Environment for Rapport

Some questions to help establish the environment to meet in:

- How shut off from the world do we want to be?
- How important is daylight?
- Do we need space to spread papers?
- What’s the right balance between being relaxed and business-like?
- Where do we normally feel at ease?
- What kind of environment makes you feel uncomfortable or threatened?
- Do you prefer to work across a table or without anything between us?
- How comfortable do you feel with direct eye contact?
- How much of a distraction would be: corridor noise outside the room? Visible activity outside the room? Other people being able to look in?
- Would a very small room/very big room be off-putting for you?
- Do you feel comfortable about being alone in a room with me? (especially important in cross-gender relationships)

The Mentoring Meeting

A Checklist for your first meeting

When you have finished your workshop, you will be given the opportunity to be matched with a mentor or mentee. At your first meeting it will help you to use this checklist to ensure you maximise the usefulness of this meeting. The checklist should contain the following:

- How long you want to talk in this session?
- What do you need to know about each other? You need to be fairly succinct and to the point in this first meeting. The names of your pets can come in a later meeting. Do remember to cover your career/employment history and interests on both sides.
- What do you both enjoy/dislike about your careers?
- Where do you both want to be in 3 or 5 years' time?
- How clearly identified are the mentee's development goals that they would like to work on within this relationship? Does the mentor need to spend some time in the first few meetings supporting the mentee in actually clarifying what the mentee would like to work on with them? Don't rush this aspect.
- If there are clear goals, are these goals in any priority order?
- How often do you want to make contact? .
- You will need some time to think about your personal boundaries, issues of confidentiality, the ground rules for your relationship and your contract. We will cover this in more detail during the training.
- What contact details are you exchanging? When are acceptable times to contact each other?
- Do you want to set the agenda for your next meeting?

For the second and subsequent meetings, Megginson and Stokes have identified a series of conversational areas that the mentor could initially explore with the mentee. These topics could include:

- Strategy
- Image
- Performance
- Relationships
- Organisation
- Managing Change

All of the above have both a personal and organisational dimension to them. For example strategy could refer to personal strategies for development or to strategy of the organisation of the mentee. These distinctions are explored in the following table:

Area of Conversation	Personal Focus	Organisational Focus
Strategy	Developing a personal strategy for dealing with own development, organisational politics or promotions.	Creating a strategy for developing and/or building upon current national/international opportunities
Image	Examining personal impact in terms of presentation, influence and the way others perceive the mentee	Exploring what constitutes an appropriate Dept/University image
Performance	Discussing personal performance and what is required in terms of being successful	Analysing organisational performance and profile against what a successful and proactive organisation might look like
Relationships	Addressing how personal relationships and personal styles impact	Considering how partnering and alliances with other organisations could improve capability
Organisation	Evaluating the extent to which personal organisation of time & effort might improve personal effectiveness	Scrutinising the organisation and structuring of the mentee's department with a view to making it more viable, where possible
Managing Change	Producing a long term development plan for personal change with a view to becoming more successful in the longer term	Thinking through how to begin and manage any organisational change that may be necessary to develop and flourish as an organisation

By using these discussion areas, mentors can begin to develop a useful working relationship with the mentee. Following the initial session, the mentoring meetings can then start to adopt a more regular format, with a structure similar to this:

- ✓ Checking in - mentor and mentee give brief details of current issues, experiences etc so that the relationship is re-established.
- ✓ Adding to the Agenda - drawing on the checking in phase, any important issues/ items are incorporated into the meeting.
- ✓ Addressing the Agenda - the agenda items -perhaps based on the above conversational areas - are discussed and explored.
- ✓ Setting the Agenda for the next meeting - the meeting concludes by developing a future agenda for the next meeting, incorporating targets for development as monitors of progress.

Issues to Consider in a Mentoring Contract or Agreement

The minimum requirement is that the mentor and mentee should discuss the issues of relationship purpose and relationship management sufficiently to acquire a shared understanding of them. The most common topics for this discussion are covered in the list below:

- What do we expect to learn from each other?
- What are our responsibilities towards each other? What are the limits?
- What responsibilities do we owe to others (e.g. line managers, peers, HR function) as a result of this relationship?
- Where and how often shall we meet? For how long?
- What limits (if any) are there on confidentiality?
- When and how shall we check this relationship is right for both of us?
- How happy are you for me to challenge and confront you?
- How do you feel about receiving direct feedback from me?
- Do you feel you can be really open with me? If not, what makes you reticent?
- Is there anything either of us definitely does not want to talk about?
- Are we agreed that openness and trust are essential? How will we ensure they happen?
- Are we both willing to give honest and timely feedback (e.g. to be a critical friend)?
- What are we prepared to tell others about our discussions?
- How formal or informal do we want our meetings to be?
- How will we measure progress?
- How will we manage the various transitions especially at the end of the formal relationship?
- To what extent are we prepared to share networks?
- When and how shall we review the relationship?
- How will we celebrate achievements?

Like a common purpose, the “contract” terms will evolve with the relationship. It is commonplace for one party or both to place quite narrow limits on how far the pair will delve into non-work issues, for example. Yet as trust develops, the boundaries tend to soften or disappear completely.

Checklist for Assumption Testing About Confidentiality

Instructions: Answer each question with a 'yes', 'no' or 'not sure'. When you have completed all eight items, decide whether there are other assumptions that you hold that should be added to the list. Review and discuss each item with your mentor or mentee. Allow a full discussion of these points before reaching your consensus.

Which of the following assumptions about confidentiality do you hold?

- What we discuss stays between us for as long as we are engaged in our mentoring relationship.
- After our formal mentoring relationship has ended, it is ok to talk about what we discussed or how we related.
- What we say between us stays there unless you give me permission to talk about it with others.
- Some issues will be kept confidential, while others will not.
- It is ok to discuss how we relate to one another but not the content of our discussions
- It is ok to talk about what we talk about as long as it is positive.

Are there any other points you should consider?

The Mentoring Process

The Three Stage Process

The model can be used in a number of ways:

- To reflect upon what mentoring involves, and to assess yourself as a mentor
- As a schedule for a mentoring meeting – to work through the stages
- As a map of the mentoring process – to see what ground has been covered and what needs further attention
- To review the mentoring relationship over time, as the mentee moves towards achieving the goals identified earlier in the relationship
- To enhance shared understanding of the mentoring process and relationship, and to develop the mentee's ability to use the model independently.
- As a dialogue framework for structuring your conversation.

The Three Stage Process for Mentoring

Stage 1	Exploration	Telling the story	Awareness building
Stage 2	Enabling a new understanding to be reached	Developing the preferred scenario	Turning point, but may need more exploration
Stage 3	Action planning enabling the learner to make their own decisions and take appropriate action	Developing strategies for action	Encourage new ways of thinking Make decisions and action plans

Stage One – Exploration

In the first stage, the mentor may have a range of strategies:

- Take the lead to open the discussion
- Pay attention to the relationship and develop it
- Clarify aims, objectives and discuss ground rules
- Support and counsel

The methods used include:

- Questioning, listening, agreeing an agenda

Stage Two – New Understanding

In the second stage, the mentor may have other strategies including:

- Support and counsel
- Offer feedback
- Coach and demonstrate skills

The methods employed include:

- Listening and challenging
- Using both open and closed questions
- Helping to establish priorities
- Summarising
- Helping identify learning and development needs
- Giving information and advice
- Sharing experience and story telling

Stage Three – Action

In the third stage, the mentor may use the following strategies:

- Examine options and consequences
- Attend to the relationship
- Agree and develop an action plan

The methods may include:

- Encouraging new ideas and creativity
- Helping in decisions and problem solving
- Agree action plans
- Monitoring and reviewing

The process rarely moves in a straight line from stage one to stage three. More often, in use, the conversation moves about between all the stages.

There can be a temptation to get to the Action as quickly as possible but often the quality and the commitment to the Action is dependent on the quality of stage one and two.

Summarising regularly can help to establish the boundaries between each stage and move the conversation either on or back into the previous stage.

The Three Stage Process can be viewed as a map of mentoring. A map shows the way and helps us to plan a route and it helps us to find where we are when we get lost.

The Three Stage Process can also be viewed as both a map for a mentoring session and a map for the duration of the relationship.

It is helpful to share the process within the relationship so that both the mentor and the mentee understand what is happening. Doing this also gives the mentoring pair a language or a shorthand to talk about their relationship.

Perhaps the most interesting thing about the Three Stage Process is that, with practice, it becomes very natural and does not seem like an intrusive technique.

Personal Reflection – Template

Mentors and Mentees may want to use this template as a reflection and record keeping too. This tool would be completed this individually after each meeting for personal reference only. Content from these reflection notes may be referenced when having your regular review conversations.

What?	What did our mentoring discussion(s) reveal?	
So what?	What are the implications or the discussion outcomes for you?	
Now what? Stop, Start, Continue	How can you build on the implications/ outcomes? What will you Stop, Start or Continue to do?	
Anything else to note:		

Reviewing your mentoring partnership

We recommend having a regular review conversation within your mentoring partnership. Here are some questions to ask each other at your review.

1. How have the mentoring sessions helped so far?
2. Have we begun to make progress towards realising our learning goals?
3. What is our greatest success so far? And our biggest frustration?
4. Are we preparing adequately for meetings?
5. Are we reflecting sufficiently after meetings?
6. Has anything changed in our contract? Review general contracting areas:
 - Expectations
 - Responsibilities
 - Boundaries
 - Confidentiality
 - Meeting logistics
 - Behaviours
7. Where are we in the mentoring lifecycle? Is there anything that we need to consider as a result?

Mentoring relationship lifecycle

