

Mentee Preparation Workbook

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INTRODUCTION

This workbook is designed to support you in identifying your needs from the mentoring relationship. It is designed to help you to draw together relevant information from your current role and past experiences that will enable you to reflect on what you are looking for from the mentoring relationship.

You will probably find that you have undertaken some of the exercises previously, but it is worthwhile revisiting them at this initial stage of the mentoring process, as your perspectives can change. You can therefore identify where you are at present – and where you would like to be in the future.

We recommend that you refer back to this resource throughout your mentoring relationship to keep track of your development. This allows you to trace improvement and helps you to stay focused.

It is important to remember that this tool is designed to assist you and you may find that you are not yet in a position to answer the questions asked.

You may decide to go through the exercises with your mentor, or even work through them together. In particular, the ‘decision making template’ at Section 3 is one which you may not be ready to tackle before your relationship begins. However, once you have identified what decisions and changes you would like to make, this is an excellent tool to provide a ‘step-by-step’ focus to guide you and your mentor through discussions about these changes.

Please be aware that your mentor will have expected you to have completed some of these exercises prior to meeting – it is important to have invested the time so that the mentoring sessions can be as productive as possible. It is only fair to your mentor, who is giving up their time, to afford this opportunity the care, effort and preparation required to ensure success.

SECTION 1

What is the Kent, Surrey and Sussex Leadership Development Mentoring Scheme?

The aim of this Mentor Scheme is to provide a high quality, confidential service to match mentees with appropriate and trained mentors.

The Scheme is designed to be complementary to local mentor schemes, both informal and formal. The benefits of the Scheme are to provide individuals with the opportunity to spend time on a regular basis with a mentor who will provide support and challenge and a broader perspective on work issues. It will focus on enabling individuals to think more widely about their work and to take supported action to develop them. It will also act as a safe and confidential arena to explore and build an understanding of the management of change.

The Mentor Scheme aims to add value to the process of management and to enhance managerial capability across organisations. The mentors come from a wide-range of backgrounds and health contexts.

Who Can Apply?

The Scheme is open to all staff who provide NHS services who work in the NHS KSS Leadership Collaborative region.

To access the Scheme staff must already have some managerial or leadership element to their role, although they do not, for example, need to have 'Manager' in their job title. They also need to be serious about managing their own development, having identified mentoring as appropriate through their organisational personal development planning process. Before being allocated a mentor, participants in the Scheme will be expected to have well-formed reasons for wanting a mentor. Participants will also be expected to have discussed mentoring with their line manager or equivalent and ideally have explicit support to proceed.

How Are Mentors Matched with Mentees?

All Mentors are involved in setting and maintaining standards for the Scheme. On joining the Scheme they become a part of the Mentor Network and are expected to participate in continuing professional development (CPD) events. NHS KSS Leadership Collaborative will maintain a confidential on-line mentoring software platform, where key information provided by Mentors will be used to undertake a managed matching process with mentees.

The Mentor's Commitment

We feel that it is important for you to understand the training that a mentor receives before becoming a mentee on the Scheme. There are two main reasons for this:

- so that you can understand the relationship from a mentor's perspective, to give you greater overall understanding of what you can expect from the relationship – the 'can-' and 'can't-do's; and
- our Scheme gives a day of training for all mentors before they make a final decision on whether to apply. We feel that it is important for you, as a mentee, to understand this training – and the reasons for the emphasis we place on it.

The Mentor Development Workshop

The Mentor Development Workshop is a very practical day, which provides an introduction to developmental mentoring. The main aims of these events are to build an understanding of the Mentor role and to share the standards for developmental mentoring to improve consistency and quality across South of England (East). They offer participants the opportunity to develop skills in building rapport, contracting, powerful questioning, effective listening and feedback.

So what can a Mentor on our Scheme offer you?

A mentoring relationship is shaped by the wishes, needs and aspirations of the mentee and by the skills and experience of the mentor. It is therefore a unique relationship but, broadly speaking, mentors carry out some of the following:

- **they enable you to put in place achievable development plans**, both for your current job and looking to the future, as well as supporting you in identifying how to achieve these.
- **they may act as a sounding board**, allowing you to talk through issues requiring a decision or action.
- **they may play 'devil's advocate'**, challenging you to face up to difficult issues and to develop self-awareness.
- **they may sign-post you and support your networking**, facilitating access for you to other people and sources of information and supporting you in developing your own networking ability.
- **they may support you in seeking out opportunities** and developmental tasks which enable you to address weaknesses, gaps in your experience and knowledge, or to raise your profile.

The mentor's role is **not** to problem solve on your behalf, to 'sponsor' you through the organisation or to act in a management capacity. They are there to support and develop you, but responsibility for the relationship lies with you, as the mentee.

The majority of your mentor's time with you will involve them listening to you and asking you powerful questions to help you to raise your own awareness on the particular challenges, issues and opportunities you wish to discuss. They will not be there to offer you advice...unless you are particularly stuck on an issue. In this instance they can contribute some options and advise you on methods they have used in their own work. This should always be the last option explored. In the main **YOU** will know what the answer is...it may just be that you are putting barriers in place to putting what you know is the right way forward into action. Your mentor can help you explore ways to remove those barriers.

Contracting Checklist

Your first meeting will involve agreeing how the mentoring relationship will progress. This is for the two of you to agree in partnership but, in order to make best use of the time together, it is helpful to consider your preferences prior to the initial meeting(s) as well as how flexible you can be if you cannot achieve your ideal situation.

Suggested Issues for Discussion

1. What is the broad aim/purpose of the relationship, what do we want to achieve?
2. What does each of us want from the other person and what can we bring to the relationship?
3. How often do we need to meet, both initially and later in the relationship?
4. How will we contact each other? (eg will we exchange home telephone numbers?)
5. Where will we meet?
6. How long will the meetings be scheduled to last?
7. Will our meetings be structured? How?
8. How will we deal with difficulties?
9. What will confidentiality mean in this relationship?
10. How will we review our progress?
11. How (and under what circumstances) will we end the relationship?

You both have responsibility to negotiate these boundaries for the relationship. Your mentor will want to spend the majority of your first

mentoring session focusing on agreeing your mentoring contract – this is invaluable in setting a ‘psychological’ contract based on trust.

SECTION 2

Preparation for your journey as a mentee

... some learning exercises...

Part 1 – The Lifeline

Focus: looks back on what you have achieved and where you have met with challenges, as well as forward, to where you would like to be

This exercise invites you to look at your life and identify the main experiences that have been significant in shaping your development.

Think about the events you want to record, bearing in mind the following guidelines:

- It might be helpful to have more than one attempt at this task, returning to it after a break of a few hours or days.
- It will be up to you to decide how much you wish to share with a mentor, but the more time and thought you devote to this activity, the more you are likely to get out of it.
- The limits that you set are down to you – you may not want to record events that are very personal to you, but choose to restrict this to work challenges.
- If you have prepared a 'lifeline' before, you may find it useful to refer back to this, but we strongly recommend that you start afresh to assess exactly where you are now.

1. Make a list of significant events in your life so far

The events you choose to record are up to you, but the following questions might help you:

- What were the best times in my life...
... and the worst?
- Which were the most challenging experiences?
- Which events involved success...
... and which failure?
- Which events involved risks and stress for me?
- Which events gave me the most pride and satisfaction?
- Which experiences did I learn most from?

2. Draw the 'Lifeline'

This will represent the ups and downs/good times and bad times in your life. It can be represented in any way you like. For example, some people draw theirs as a road, showing junctions in the road where important choices were made, and even using

traffic lights and roadworks to show frustrating delays. Some people use colour or symbols to show high and low points, whilst others merely draw a simple 'peaks and troughs' line across the page.

3. Examine and reflect on the route you have drawn

Consider your Lifeline as a whole. Look at how the paper has been filled, noting your use of space, colour, and symbols. Think about the feelings evoked by the experiences recorded.

What does this lifeline say about me?

Read through the following questions. Write down your answers, adding any thoughts or ideas as they occur to you.

Are there specific themes throughout?

For example, to do with:

- Your family life
- Your career in paid work
- The ups and downs of your health history
- Your achievements in sport or a hobby
- Your progress as a learner/student

Are there any patterns?

For example:

- high points might relate to achievements in leisure pursuits and low points to disappointments in your work.
- The line might tell a story of steady growth, steady decline, or a series of ups and downs.
- One 'theme', eg health or work, might dominate the others.

Are there any obvious lessons to be learned from looking at my Lifeline?

For example does this show how much (or little) has been achieved or how little (or much) you have been able to control the main events in their lives?

You might want to go back and revise your Lifeline, perhaps adding events you had not thought of when you first drew it. You might also want to add comments to some of the events to indicate why they were significant to you.

4. Looking forward

Once you have completed your Lifeline so far, go through steps one to three again, but this time with a change of focus. Look to the future and consider:

- What is most likely to happen given your current situation?
- What would you like to happen?
- What changes would you need to bring for this?
- How is this going to present challenges for you?
- Where an event has involved success, will this continue? How?

- Where an event has involved failure, is it necessary to bring about change? Is the emphasis upon you to make changes, or is this due to factors beyond your control?

Look as far forward as you feel comfortable with, but we would recommend at least the next three years. Think this through carefully, and realistically, but remember that this is a tool to help you to pinpoint where you are going – so do not put undue pressure on yourself, and remember that trying to identify what it is that you are looking for is not an uncommon objective when deciding that you would like a mentor.

If you are at a crossroads, you may find it useful to split your lifeline into two or even more lines to consider the range of possibilities for you. This will depend very much upon yourself and your present focus, but it can be a very revealing tool.

Part 2 - An up-to-date CV

Focus: where are you at present? What are your skills and experiences? Are you using these effectively? What new skills will you need?

During the Lifeline exercise, you identified your experiences and skills so far. While in this frame of mind, it is a good time to create an up-to-date CV.

A CV is not only useful when you are looking for a new job, but from a personal perspective it helps to highlight the existing skills and experiences that you have. This is useful for a range of purposes, including:

- if you are starting a new project or role, or managing change, a CV will help you to identify any transferable skills you have for this
- if you are at a crossroads, then writing a CV, much like plotting a lifeline, will help you identify how you have progressed, and whether there is any natural progression for you
- a CV highlights positives, which you do not necessarily appreciate if you have not applied for a new job for a while. You are continually developing new skills, and by breaking these down in a CV, you become more fully aware of them

- a CV also highlights any gaps in your experiences and skills. It can help you to focus on areas where you may like to develop further, eg you may be developing skills, but want training to formalise these and increase your confidence.

A CV is an excellent start for a mentor wanting to learn about you. It breaks down your work experiences, skills, etc, to their very basics, giving a good starting point for discussion and development.

Should you need help writing a CV, there are a wide number of web-sites which provide information for you. Have a look on the web and find a style that appeals to you and start to take control of your career planning.

Part 3 – Decision Making Template

Focus: having identified where you are at present, and beginning to look at where you want to be, how are you going to get there? What needs to be changed and developed?

Of all the exercises in this pack, it is the decision making template which is the most open to interpretation, and it will be down to you to adjust it to meet your needs. It is unlikely that all the questions included will apply to you and any decision that you make. However, the aim of this exercise is:

- to ensure that you identify the full range of work areas where you would like to see decisions made, change or development
- to act as a starting point for further discussion and to probe deeper about any ideas that you have
- to encourage you, and your mentor, to cover as many implications of any decisions that you are making as possible
- as a template, to act as a 'note-taking' device for any discussions that you and your mentor have
- to provide a structure for these discussions, where necessary.

Please feel free to add any further questions that you feel are needed and to discard those which you do not feel relevant. By discussing the questions raised in this template with you mentor, you may find that you differ in opinion about what is and what is not important when making decisions and bringing about change - and deciding what may or may not be included in the discussion can be a useful exercise in itself.

Decision Making Template

This template has been adapted from the Change and Innovation Template designed by Sharon Drew Morgen 2004, which can be found at <http://www.businessballs.com/>

1. Looking around your environment, what ongoing issues are there that you have not dealt with yet? You may like to divide these into categories, eg personal, professional issues and team issues.
2. What has prevented you from dealing with them until now? Are these issues which are within your control? Should it be you who is dealing with them, or is this down to someone else? Would you be able to deal with them if something else was to happen?
3. What criteria do you use to decide what aspects of the situation need to be changed? For example, have you considered this in terms of improving work performance, improving job satisfaction, making life easier for your team, etc?
4. Bearing 1, 2&3 in mind, are there any issues that you can 'take out' of your decision making, as beyond your control?
5. What needs to or should stay the same? What is working well? What cannot change, and why?

6. Who else will need to be considered in bringing about these developments? Who will be affected by any changes? Who could help you to bring them about?
7. How do you plan on bringing these people into the decisions you need to make?
8. How will you know if they support you?
9. How will you handle negative reactions from others?
10. What tools will you, and those you involve, use to determine all the aspects that need to be managed?
11. What elements of the situation need to be shifted first?
12. What elements of the situation need to be shifted second?
13. How will you monitor your process?
14. What will success look like?

SECTION 3

On-going analysis and reflection

The mentoring relationship is a process of continual learning and assessment. This is maximised when we follow the learning cycle (Kolb) of being involved in an activity, including an awareness of what we have done in that activity, reflecting on what we learned, considering how that fits in with what we are doing, and deciding to put our learning into practice.

As such, it will be useful to keep a Learning and Development Portfolio to consider your progress and reflect following your meetings or completion of an activity.

Two possible templates are outlined overleaf.

Development Logs

These extracts has taken from the Planning How to Move on Section of the “Broadening Horizons: Map out your Future” workbook, produced by the Department for Education & Skills (1999).

Key Skills Development Log

What & Why	Learning	How used & evidence	Date
IT – using PowerPoint presentations for board	“How to use PowerPoint” book & morning course	Used regularly for team meetings	
IT – the Internet for research & DofH updates	Accessing, exploring and searching sites – trial & error!	Accessed recent Exec’s bulletins	

Continuous Professional Development Log

Date	What & Why	Learning	How Learning Used
	Course planning meeting - work	What the course covers, who attends and why	Contributing to the course
	Training session on working with adults - work	Teaching techniques for working with adults	In lectures and as evidence in applications
	Mentoring – personal development	A mentor role and mentoring style. The challenges – everyone has doubts about being able to use their skills in lots of different situations.	In mentoring activities and in the way I work. Trying to be more confident and use my skills.
	Reading – advice on self-assessment, Inland Revenue	How self-assessment applies to me	Completing my tax return and advising students and trainees

Mentoring Meeting Review Template

The template overleaf will provide a useful means of evaluating each mentoring meeting and tracking development across the full term of the relationship. This feedback will also help your mentor to develop their competence further.

Date:

With Whom:

Mentoring Meeting

To help evaluate a meeting both should answer the following questions:

1. Score of 1-10 how did it go?

2. What went well?

3. What could have been better?

4. What did you learn?

5. What did you learn about your mentor / mentee?

6. Pertinent issues for next time:

Review this at the beginning of next session

Bring an issue to the meeting and articulate expectations at the beginning.

Review after 3-6 months

This template was developed by Anne Porter, Lead Nurse at CMMC, March 2006