

# How to set up a Mentoring Scheme

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<https://heeo.e.hee.nhs.uk/faculty-educators/coaching-and-mentoring>



*Health Education England*

# Mentoring training workshops



@NHS\_HealthEdEng

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# Roles & Responsibilities

Mentoring Scheme Lead / Administrator

Mentor

Mentee

# Mentoring Scheme Standards

On HEE East of England mentoring website

- Eligibility to participate
- Information for mentees
- Matching process
- Training
- Safety
- Quality assurance



## Standards For A Mentoring Scheme

These standards have been developed to allow Scheme Organisers to set up high quality, safe, effective schemes.

Attribute	Essential	Desirable	Evidence
Eligibility to participate	<p>No discrimination in eligibility for scheme based on gender, ethnicity, disability, age or other protected characteristics</p> <p>Schemes must be on to trainees at all performance levels, not just trainees in difficulty</p> <p>Participation must be voluntary. Compulsory participation will result in poor engagement and will not result in good outcomes</p>	<p>Some schemes may be targeted at groups facing particular challenges (exams, times of transition) but ideally all trainees should be eligible to participate in a scheme as a Mentee.</p>	<p>Promotional materials</p> <p>Application forms to join scheme</p>
Information for Mentees	<p>Mentees must have access to information about the mentoring process and its potential benefits</p> <p>Mentees must be aware of the principles of confidentiality within the mentoring relationship and its limits</p> <p>Mentees must be aware of how to raise concerns about their Mentor if necessary</p>	<p>Mentees should have access to training about the relationship and advice about how to prepare for mentoring sessions</p> <p>Mentees should be given advice about structured reflection to use if they choose</p>	<p>Information given to mentees before participation</p> <p>Information available to Mentees during the scheme</p>
Matching process	<p>Mentees must be matched with Mentors who are not involved in their appraisal process or Educational Supervision</p> <p>There must be a process for recognising mentoring relationships that do not work and for reassigning Mentees to a new Mentor if they wish</p>	<p>Mentees should have some input into the matching process, recognising that it will not always be possible to match mentees with their first choice mentor. Some Mentees may choose not to take up this opportunity</p>	<p>Evidence of a systematic matching process</p> <p>A policy for dissolving unsuccessful relationships</p>

## HEEoEE Standards For A Mentoring Scheme

Attribute	Essential	Desirable	Evidence
Training	<p>Mentors must understand the concept and potential benefits of mentoring</p> <p>Mentors must have training in mentoring skills (including non-judgmental, non-directive approach, listening skills and a mentoring model e.g. GROW)</p> <p>Mentors must understand the importance of confidentiality within the mentoring relationship and its limits</p>	<p>Mentors should have face to face training in mentoring skills</p> <p>Mentors should have opportunities to keep their skills up to date and for ongoing development and enhancement of their mentoring skills</p>	<p>Training records for Mentors in the scheme</p> <p>Evidence of ongoing training opportunities and refresher training for existing Mentors</p> <p>Evidence of contracting between Mentors and Mentees with agreed confidentiality guidelines</p>
Safety	<p>There must be clear referral pathways should patient safety, safeguarding, fitness to practice or other similar issues arise</p>	<p>Scheme organisers should be available to offer confidential advice to Mentors</p> <p>Mentors (and Mentees) should be able to access a list of potentially useful resources to which their Mentees can be signposted</p>	<p>Written guidelines on referral and escalation pathways</p> <p>Evidence of a list of resilience resources which is accessible to Mentors and Mentees</p>
Quality Assurance	<p>Mentoring schemes must be regularly evaluated including obtaining feedback from Mentors and Mentees</p> <p>Mentoring schemes must seek feedback on individual Mentors from their Mentees</p>	<p>Mentoring scheme organisers should take timely actions to make reasonable adjustments to schemes in light of any feedback received</p> <p>There should be a process to identify and address additional training needs of individual Mentors</p> <p>Mentor schemes should consider producing an annual report (template available on HEEoE Coaching and Mentoring website)</p>	<p>Feedback from participants</p> <p>Evidence of changes made to scheme in response to feedback</p> <p>Scheme Annual Report</p>

# Developing Your Vision

- What is your aim/goal?
- What do you want to achieve
- Break down your goal..

S	SPECIFIC
M	MEASURABLE
A	ACHIEVABLE
R	RELEVANT
T	TIME BOUND



# Setting up a Mentoring Scheme – Step by Step



## Key steps to launching a Mentoring Scheme



# Identify Your Team

- Expertise is important
- Enthusiasm even more so
- Define roles
- Meet regularly
- Deadlines and terms of involvement
- ...as the scheme becomes stable and established → start to plan succession planning



# The People

- The Leads
- The Organisers
- Administration
- Supervision – consultant/named senior for escalation/support



## Key steps to launching a Mentoring Scheme



# Identify Target Mentees and Mentors

Decide who **your mentees** will be

Trainees vs grades vs location

Decide who **your mentors** will be

same speciality? Same profession? same organisation





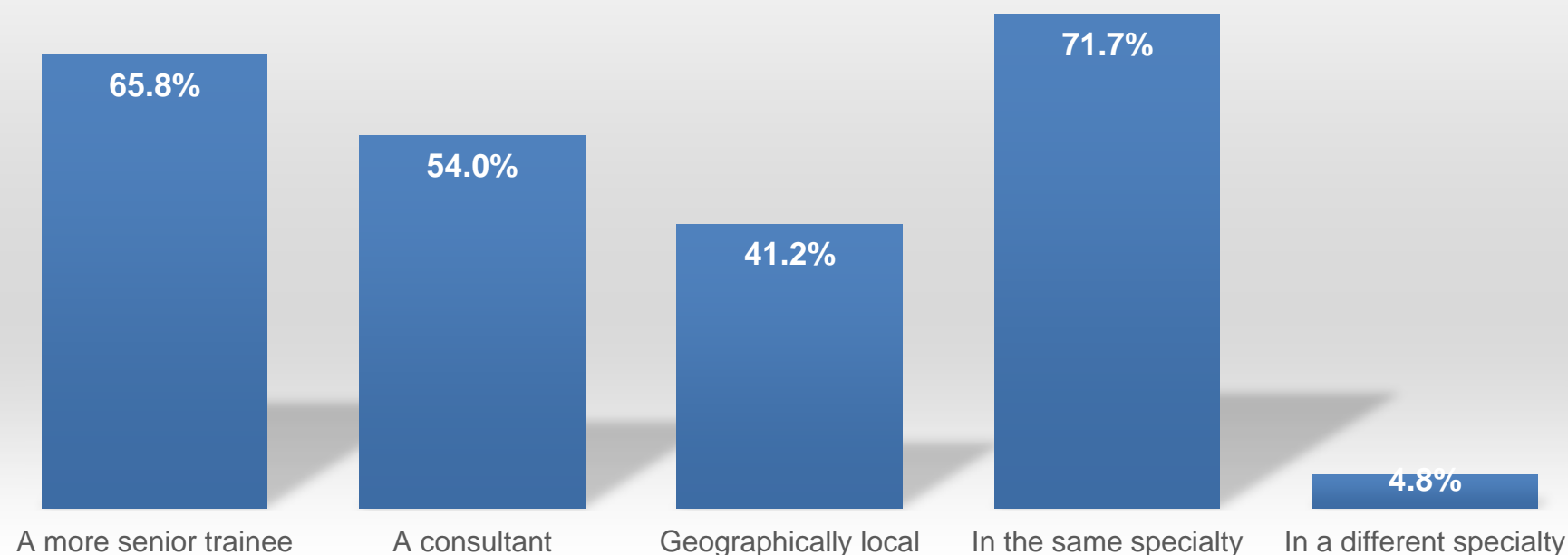
# How will you recruit them?

- Identify how you are going to contact and recruit mentors
- Plan who you are targeting as mentees and how to contact them
- Mentor matching and contracts



# Trainee Forum Survey 2016/17

As a Mentee would you prefer  
a Mentor who is:



# Mentor person specification


Attribute	Essential	Desirable
Mentor Training	<ul style="list-style-type: none"> <li>Has completed a <b>training course</b> in mentoring</li> </ul>	<ul style="list-style-type: none"> <li>Previous experience of mentoring (as a mentor or mentee)</li> </ul>
Communication Skills	<ul style="list-style-type: none"> <li>Consistently <b>good communication skills</b></li> <li>Excellent <b>active listening skills</b></li> <li>Ability to establish a rapport</li> <li>Able to sensitively challenge beliefs</li> <li>Able to summarise and reflect back to a mentee</li> </ul>	<ul style="list-style-type: none"> <li>Able to recognise and manage resistance and conflict</li> </ul>
Attitudes	<ul style="list-style-type: none"> <li><b>Non-judgmental</b></li> <li><b>Non-directive</b></li> <li>Positive</li> <li>Supportive</li> <li>Honest</li> <li><b>Commitment</b> to participate fully in the mentoring relationship</li> </ul>	

# Mentor person specification

Attribute	Essential	Desirable
Recognition of limitations	<ul style="list-style-type: none"> <li>Knows and follows confidentiality guidelines</li> <li>Knows limits of confidentiality and when and how to seek guidance</li> <li>Recognises when to refer Mentee on to other services</li> </ul>	<ul style="list-style-type: none"> <li>Promotes self care</li> <li>Knowledge of other support services available to trainees</li> </ul>
Lifelong learning	<ul style="list-style-type: none"> <li>A reflective approach to their own practice as a clinician and as a mentor</li> <li>A willingness to maintain and refresh their mentoring skills</li> </ul>	<ul style="list-style-type: none"> <li>A desire to enhance own mentoring skills</li> <li>Able to engender reflective approach in others</li> <li>Role models personal development skills</li> </ul>
Medical Knowledge	<ul style="list-style-type: none"> <li>Knowledge of postgraduate medical training in the UK</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge of the specific healthcare context in which the Mentee works</li> </ul>

# Plan who to target as mentees

- Voluntary vs compulsory scheme
- Mentoring matching



**NHS**  
Health Education England

**{Insert Scheme Name Here}**

**Mentee Application Form**

Please complete this form and return it to {email address} by {date}

Name:

Email Address:

Current job role (grade):

Place of work:

What is the maximum distance you would be willing to travel to meet your Mentor?:

Why do you want to participate in the mentoring scheme?

What are your professional interests?

What are your personal interests and hobbies?

Any other information that we should be aware of?

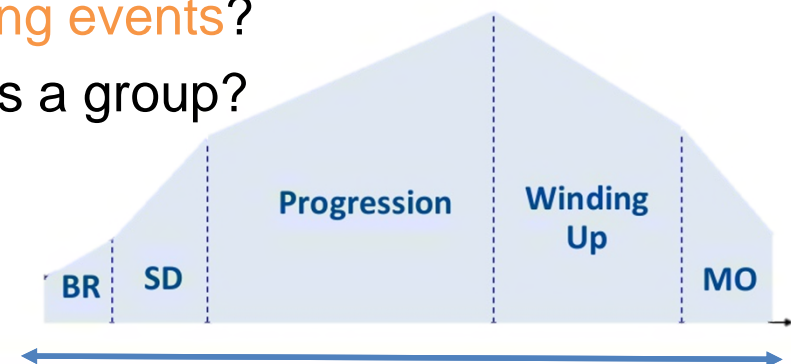


## Key steps to launching a Mentoring Scheme



# Structure of Your Scheme

- Cohort **intakes** / pairing at any time?
- **How many Mentees** will a Mentor have?
- **Duration** of relationship
- **Frequency** of mentor – mentee meetings
- What happens when trainees move to another post?
- Consider the number of **training workshops** needed
- Will there be networking / **social / sharing events**?
- **How will you communicate** & interact as a group?



## Key steps to launching a Mentoring Scheme



# Governance Framework

- Mentoring scheme standards
- Mentor and mentee application forms
- Mentee matching emails
- Person specification for mentor
- Mentor-mentee agreement:  
mutually accepted and signed

- Register the scheme
- Scheme evaluation
- Mentoring feedback
- Mentoring annual report

Decide if copies be kept centrally



# Why use an agreement?

- **Confidentiality**
- Commitment
  - How often will you meet? Where? How?
- Respect
- Boundaries
- No-fault divorce



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# Have processes in place for safety and supervision

- Participants must be adequately supported
- **Supervision** for mentors
- Referral pathways for **doctors in need** should be clear
- Programme coordinators should be readily available

## Key steps to launching a Mentoring Scheme



# How could your scheme deliver training?

- Can **people in your scheme** deliver the training?
- Can your **potential mentors** travel to **attend** a course?
- Study leave / training time vs rota pressures
- Make use of the e-learning for health resources on mentoring  
<https://www.e-lfh.org.uk/programmes/medical-mentoring/>

## Key steps to launching a Mentoring Scheme



# Processes for Matching

- Are places limited?
- **Mentee input** into pairings preferable
- Mentors should be independent of supervision and appraisal
- 'No fault' divorce



# Think about...

- Sample mentoring matching email HEE website

Dear {Mentor Name},

Welcome to the {Scheme Name}! We are delighted to inform you that you have been matched with a Mentee. We hope you will enjoy a fruitful mentoring relationship with your Mentor.

You have been matched with {Mentee Name}. His/her email address is {Mentor Email} and he/she has been asked to contact you in the next few weeks to arrange your first meeting. If you have not heard anything by {date} you may like to contact them yourself.

We hope you will have a productive relationship. However, if you have any concerns about this match or any other worries please do not hesitate to contact the team at {email address}.

Best wishes,

{Name}

- Contracting
- Who will be available for queries?

## Key steps to launching a Mentoring Scheme



# Launch

- Think about branding
- Raise profile **in advance**
- Would a launch event be useful?



# Active Promotion

- In addition to the **promotional material** to reach your mentors and mentees
- Promote the scheme not just at onset, but to **keep it active**
- As well as initial launch event...consider whether requires repeat launch event **annually at each 'changeover'** of mentees.

## Key steps to launching a Mentoring Scheme



# Supporting Your Mentors

What needs do you anticipate they will have?





# Ongoing Training

- Identify gaps in skills
- Structured reflection
- Build a community of practice for formal individual accreditation



# Key steps to launching a Mentoring Scheme



# Evaluation and Quality Assurance

- Collect feedback and make adjustments
- Who will collect feedback
- How often and when?
- What format will feedback take place in?
- Electronic vs paper
- Anonymous?
- How will you evaluate if the scheme is meeting mentoring scheme standards outlined earlier



# Collect feedback

Important for sustaining and improving a scheme

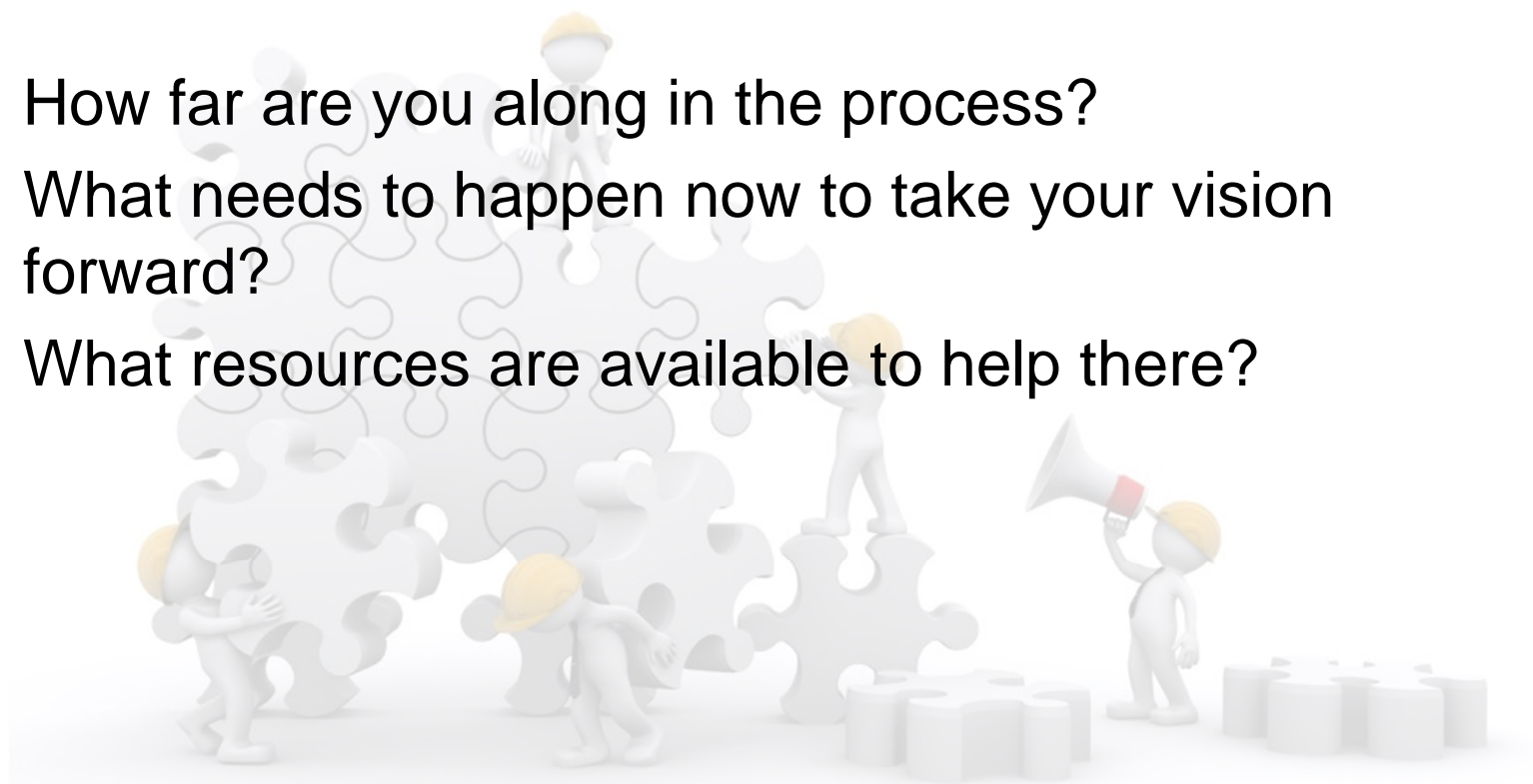
Support for mentors and mentees



- Identify and record which mentor-mentoring contracts were **completed**
- Identify which were **ended earlier than contracted**; confirm no significant events occurred
- Support and encourage **feedback** from the Mentee
- Support and encourage feedback and **reflection** from the Mentors
- Identify and address any 'logistical' and **support issues raised**.

## What Next?

- How far are you along in the process?
- What needs to happen now to take your vision forward?
- What resources are available to help there?



E-mail: **mentoring.eoe@hee.nhs.uk**

Website:

[www.heeoe.hee.nhs.uk/coaching\\_and\\_mentoring](http://www.heeoe.hee.nhs.uk/coaching_and_mentoring)

Follow us at **@eoementoring**





A word cloud on a black background featuring various terms related to career and personal development. The words are in different colors and sizes, with 'OPPORTUNITY', 'ACHIEVEMENT', 'DEVELOPMENT', and 'POTENTIAL' being the largest. Other words include 'STRESS', 'BURNOUT', 'TRAINING', 'STRETCHING', 'ACHIEVE', 'CHALLENGES', 'GUIDANCE', 'PORTFOLIO', 'COMMITMENTS', 'SATISFACTION', 'HEALTH', 'COMMUNICATION', 'RESEARCH', 'PUBLICATIONS', 'COLLEAGUES', 'LEADERSHIP', 'SUCCESS', 'REVISION', 'BALANCING', 'CAREER', 'ARCP', 'BUSINESS', 'INSIGHT', 'GOALS', 'ACADEMIA', 'EXAM', 'BALANCE', 'SMART', 'CHOICES', 'POTENTIAL', 'DEVELOPMENT', 'ACHIEVEMENT', 'OPPORTUNITY', 'TRANSITION', 'WORK-LIFE', 'STRESS', 'BURNOUT', 'TRAINING', 'STRETCHING', 'ACHIEVE', 'CHALLENGES', 'GUIDANCE', 'PORTFOLIO', 'COMMITMENTS', 'SATISFACTION', 'HEALTH', 'COMMUNICATION', 'RESEARCH', 'PUBLICATIONS', 'COLLEAGUES', 'LEADERSHIP', 'SUCCESS', 'REVISION', 'BALANCING', 'CAREER', 'ARCP', 'BUSINESS', 'INSIGHT', 'GOALS', 'ACADEMIA', 'EXAM', 'BALANCE', 'SMART', 'CHOICES', 'POTENTIAL', 'DEVELOPMENT', 'ACHIEVEMENT', 'OPPORTUNITY'.