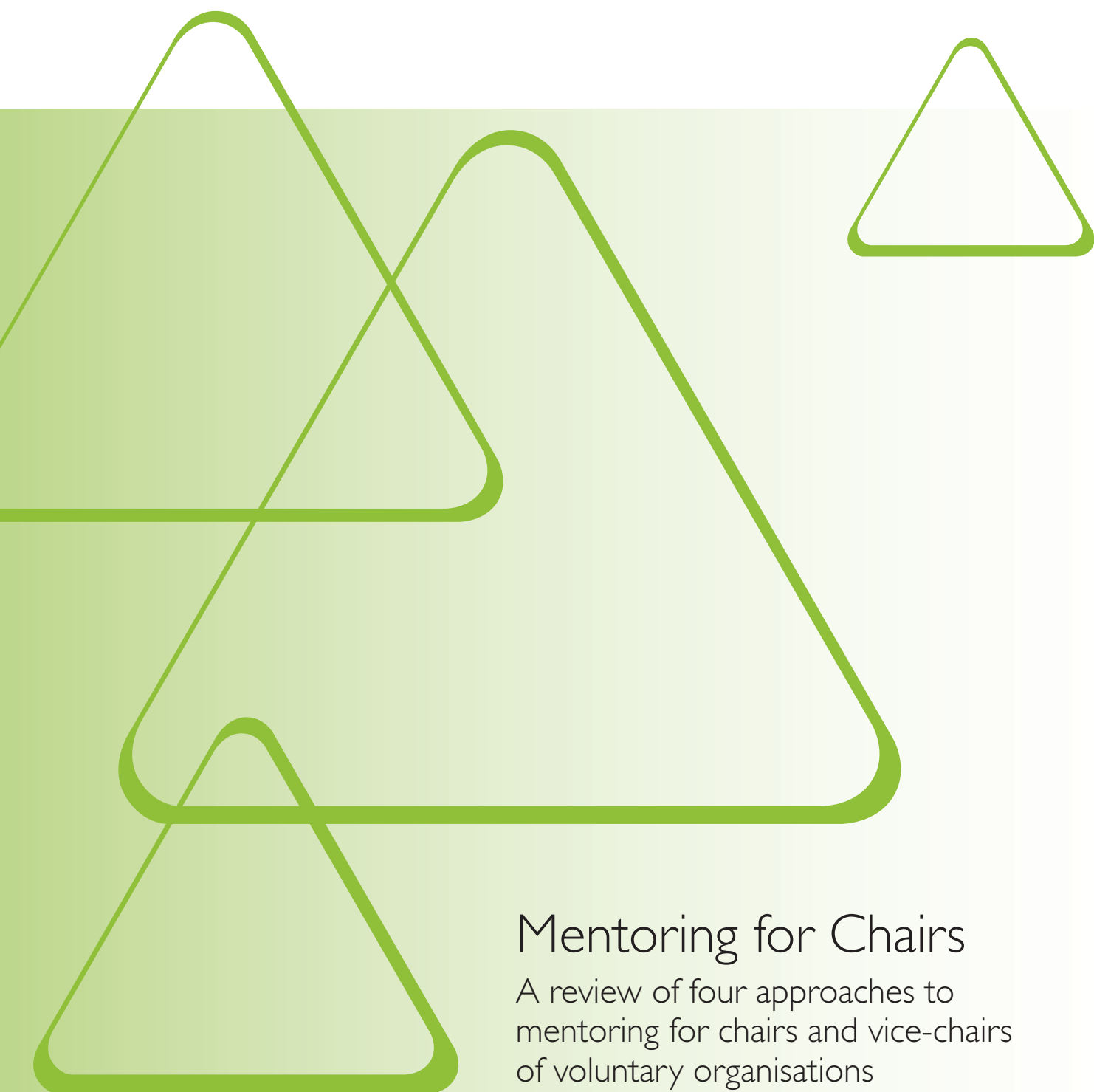




governancehub



Mentoring for Chairs

A review of four approaches to mentoring for chairs and vice-chairs of voluntary organisations

The Governance Hub is a partnership of nine organisations that provide support to the voluntary and community sector: Association of Chief Executives of Voluntary Organisations (acevo), Black Training and Enterprise Group (BTEG), British Association of Settlements and Social Action Centres (bassac), Charity Trustee Networks (CTN), East Cornwall Council for Voluntary Services (ECCVS), National Association for Voluntary and Community Action (NACVA), National Council for Voluntary Organisations (NCVO), Social Enterprise Coalition (SEC) and Volunteering England. The accountable body for the Governance Hub is NCVO (charity number 225922).

The Governance Hub is one of six national Hubs of expertise, developed as part of the ChangeUp programme to build capacity and improve the infrastructure of the voluntary and community sector.

The other five Hubs are concerned with: Finance, ICT, Performance, Volunteering and Workforce.

The Hubs are funded by Capacity Builders.

This publication may be reproduced free of charge in any format or medium provided that it is reproduced accurately and not used in a misleading context. The material must be acknowledged as Governance Hub copyright and the title of the publication specified.

While all reasonable care has been taken in preparing this publication, the publishers cannot assume any responsibility for any errors or omissions.

© National Council for Voluntary Organisations

First published October 2007.

Published by NCVO on behalf of The National Hub of Expertise in Governance

Web: www.governancehub.org.uk

Email: governance.hub@ncvo-vol.org.uk

Designed and printed in the UK by d4b design for business

Mentoring for Chairs

A review of four approaches to mentoring for chairs and vice-chairs of voluntary organisations

By Rosalind Oakley

Centre for Charity Effectiveness

Cass Business School

Acknowledgments



Mentoring for Chairs is the result of a collaborative project funded by the Governance Hub. This review has been developed with input, experience and ideas from the following people who I would like to thank:

Sarah King at the Governance Hub

Ruth Lesirge at the Centre for Charity Effectiveness

Katia Herbst at the Centre for Charity Effectiveness

Alison Chambers at Community First in Herefordshire & Worcestershire

Karen Heenan at Charity Trustee Networks

Contents

1. Introduction	5
2. What is mentoring?	6
3. The Governance Hub pilot programme	7
4. Mentoring for chairs: four approaches	8
4.1 One-to-one mentoring: Community First	8
4.2 Small group mentoring: Community First	11
4.3 Peer-to-peer e-mentoring: Charity Trustee Networks	13
4.4 Co-mentoring: Centre for Charity Effectiveness	16
5. Learning points from the pilots	19
5.1 What were the needs of those seeking mentoring?	19
5.2 Who might come forward for mentoring?	19
5.3 Does personal referral help recruitment?	20
5.4 Do different mentoring approaches suit particular needs?	20
5.5 Matching process	21
5.6 Cost to participants	21
5.7 Cost of different approaches	22
6. Conclusions	23
7. Resources and further reading	24
7.1 Planning checklist	24
7.2 Examples from the pilot programme	24
7.3 Additional resources	24
Appendix 1 Issues planning checklist	25
Appendix 2 The GROW model	26
Appendix 3 Co-mentoring – practical pointers	28
Appendix 4 Chairs' mentoring agreement	30

I. Introduction

“The opportunity to talk freely to someone uninvolved in my own organisation, but with similar responsibilities in another organisation, was extremely beneficial. Expressing concerns aloud that I usually keep to myself helped me to challenge my assumptions and thoughts – and thus to reach more balanced views and to better anchor my thoughts. The experience has led me to take a more structured approach to the problems with which I was concerned coming into the project”

Participant in CCE co-mentoring pilot project

The chair, a little like the CEO, often feels lonely and, rightly or wrongly, is reluctant to share issues with the rest of the board. Sometimes the chair feels that the burden of the whole organisation rests on their shoulders, and that they are responsible for solving the organisation's problems. Mentoring allows the chair to off load issues confidentially, to gain a sense of perspective and to think afresh about challenges and opportunities.

The Governance Hub's research into the needs of chairs identified a very strong desire on the part of chairs to have mentoring support. 55% said they would like the support of an informal mentor, and 81% would welcome access to a paid mentor. (45% said they already accessed informal mentoring support and 19% accessed paid mentoring).

As a response to this need, the Governance Hub commissioned a chairs and vice-chairs mentoring pilot programme. The purpose of the programme was to pilot a range of different approaches to providing mentoring for chairs. This guide provides a brief description of the pilots, detailed reports of each is available on the Governance Hub website. The pilots were run independently of each other, but the organisers came together to review common learning points and areas of difference.

The purpose of this guide is to:

- Share learning from all three pilot mentoring projects for chairs¹
- Identify some strengths and weaknesses of the different approaches
- Provide some example tools and templates from the pilot projects
- Signpost to other resources

The guide will be useful to anyone interested in setting up or funding mentoring schemes for chairs and vice-chairs. It may also be of interest to those who have established their own informal mentoring relationships, or are intending to do so.

¹ There were three pilot projects but four different approaches were piloted.

2. What is mentoring?

“The basic model of mentoring is that one person passes their greater knowledge and wisdom to another”

J Hay, 1995

Transformational mentoring: creating developmental alliances for changing organizational cultures

“Mentoring is the process by which one person (the mentor) encourages another individual (the mentee) to manage his or her own learning so that the mentee becomes self-reliant in the acquisition of new knowledge, skills and abilities, and develops a continuous motivation to do so. Furthermore mentoring is also a process by which the whole person, i.e. their work and personal life, is being developed and which enables and supports (major) change within these areas”.

Nadine Klasen with David Clutterbuck, 2003

Implementing mentoring schemes, a practical guide to successful programs

There is no universally agreed definition of mentoring. The definitions above represent two broad schools of thought. One approach sees mentoring as the relationship between a more experienced or powerful mentor and a less experienced partner referred to as a mentee or sometimes a protégé. The mentor may act as a sponsor to the mentee in some way. The alternative approach places the emphasis on people taking charge of their own development. The relationship is more mutual and focuses on building capacity and self-reliance.

There is also much debate about how mentoring relates to other forms of personal development, such as coaching, counselling and training. Typically mentoring covers the issues identified as important by the mentee, rather than those being suggested by a coach or teacher. Whereas coaching tends to be related to a specific aspect of performance, and goals may be set by the coach, mentoring is more likely to take a wider view and the goals are determined by the mentee. These may well go beyond work to include wider personal goals. In practice, a mentoring relationship may include aspects of coaching, training and counselling.

3. The Governance Hub pilot programme

The Governance Hub pilot programme started in January 2007 and ran for six months. Four different approaches to mentoring were used.

- One-to-one mentoring run by Community First (CF)
- Facilitated small group mentoring (action learning) run by Community First (CF)
- E-mentoring (peer-to-peer) run by Charity Trustee Networks (CTN)
- Co-mentoring run by the Centre for Charity Effectiveness, Cass University Business School (CCE)

The four pilots were run independently of each other. The Centre for Charity Effectiveness provided an overall monitoring and evaluation framework for use by all the pilots. Draft reports of the pilots were shared, and a debriefing meeting held to identify key learning from across the different pilots. One pilot, e-mentoring, is continuing as a new CTN service. This guide is based on the experience of the four pilots, and the perspectives of those organising them. The table below summarises some of the features of the four pilot projects in the Governance Hub programme.

Approach	Who might it suit?	Cost		Minimum resources needed
		Set-up	Ongoing	
Mentoring 1:1 led by 'expert' mentor	<ul style="list-style-type: none"> • Those preferring a structured approach • Those seeking help with particular problems 	££	£££	<ul style="list-style-type: none"> • Recruitment process for mentors and mentees • Matching process • Guidance documents for mentors and mentees
Co-mentoring Peer pairs mentor each other	<ul style="list-style-type: none"> • Self reliant • Comfortable with self-directed learning • Can tolerate ambiguity 	££	££	<ul style="list-style-type: none"> • Recruitment process for mentees • Written materials • Matching process • Set up briefing
Group mentoring Facilitator enables sharing of issues and experience	<ul style="list-style-type: none"> • Small groups with similar challenges • May be a good first step to 1:1 mentoring or co-mentoring 	££	££	<ul style="list-style-type: none"> • Recruitment process for mentees • Introduction to group mentoring • Facilitator
E-mentoring Peer pairs mentor each other electronically	<ul style="list-style-type: none"> • Geographically dispersed • Comfortable with technology 	££	£	<ul style="list-style-type: none"> • Recruitment process for mentees • Website/e-mail • Matching process • Guidance documents
KEY: £ Low cost ££ Medium cost £££ High cost				

The four pilot projects are described in more detail in the next section. They are also the subject of individual reports² available on the Governance Hub website www.governancehub.org.uk

² The one-to-one and small group mentoring pilots run by Community First are described in one report.

4. Mentoring for chairs: four approaches

4.1 One-to-one mentoring: Community First

The programme was run by Community First and was focused on chairs of community organisations in the Hereford and Worcester area.

Approach / model

The chosen approach was one-to-one mentoring between each chair, and an experienced coach/mentor, who had expertise in governance issues. With one exception, the mentoring was face-to-face. Mentees were offered a maximum of six sessions of one hour. The mentoring was offered free to participants, although the mentors were paid by Community First. Travel costs were the responsibility of those taking part.

Rationale for chosen model

Using an experienced/expert mentor to support a mentee is a tried and tested approach. The use of trained experts was also favoured because it ensured advice was informed by good governance principles.

Profile

Seven chairs enlisted in the pilot programme, five from the locality, one from Oxfordshire, and one from Berkshire (this last one was conducted by phone). There were five men and two women, and ages ranged from 24 to over 75. One mentee was registered blind.

Process

Planning and preparation

Community First prepared materials for the pilot. These included: a statement of the aims of the project; a confidential questionnaire; a mentoring agreement; checklist; and three tools: personal learning plan, reflection note technique and a progress review.

Recruitment

Community First promoted the pilot scheme in its newsletter and on its website. It was also featured on the Governance Hub website. Recruitment was not a problem and interest exceeded places available.

Matching process

Mentees were simply assigned to the professional advisers engaged in the project, according to availability.

Mentoring

The first session focused on:

- Return of confidential questionnaire (used for evaluation purposes)
- Negotiation and signing of agreement
- Discussion and agreement of confidentiality
- Further confirmation of what mentoring can (and cannot) offer
- Going through 'check-list'
- History/background of mentee
- Establishing goals for mentoring (and beyond if appropriate)

Subsequent sessions were shaped by the goals of the mentee and are confidential to them. Brief notes were sent by the mentor after each meeting, and any actions arising were briefly reviewed at the next meeting.

The final session focused on:

- Re-visiting the 'check-list'
- Checking whether expectations had been met
- Feedback on mentoring
- Future actions
- Confirmation of where to get further help if needed

Cost

One-to-one mentoring	
Set-up resources	Time / cost
Develop promotional materials, recruit participants, recruit appropriate mentor.	Variable – Likely minimum 7 days, but potentially more
Ongoing resource to provide 1:1 mentoring support to 20 people	Time / cost
6 one-hour mentoring sessions for 20	16 days (120 hours)
Plus one hour of non-contact time per session	16 days (120 hours)
Room hire for 120 hours at £10 per hour	£1,200
Review and evaluation	1 day
Total ongoing resources for 20 people	33 days and £1,200 costs

Results

All participants were positive about their experiences compared to their initial expectations.

“To be able to share the burden, worries and challenges with a sympathetic ear has been important, as has been the sense that the problems I’ve faced are not uncommon. But most useful has been the ability to problem-solve challenges and difficulties on two levels: first, through understanding the principles behind good governance and management; and second, looking at practical ways of implementing these principles. The most useful benefit has thus been the practical emphasis rather than concentrating on pure theory”.

Participant in Community First’s one-to-one mentoring pilot

4.2 Small group mentoring: Community First

The pilot programme was run by Community First and was targeted at chairs of village halls/ community buildings in the Hereford and Worcester area.

Approach / model

The chosen approach was a small group mentoring one, using action learning principles. This entails a series of facilitated group meetings for the participants.

Rationale for chosen approach

The key driver in choosing this model was its potential sustainability, recognising that the cost of running an action learning set for six participants is substantially less than paid support to participants in a one-to-one mentoring relationship.

Profile

Six participants were recruited; all were chairs of village halls or community buildings.

Process

Planning and preparation

Community First recruited an experienced facilitator, familiar with running action learning sets. Materials used in the pilot included a confidential questionnaire and a checklist.

Recruitment

The pilot action learning set was promoted using the Community First website and newsletter. In contrast to the one-to-one mentoring, recruitment proved difficult. This was partly due to a lack of familiarity with the concept of action learning, though other factors such as availability on the scheduled dates is also likely to have contributed.

Matching process

This approach does not require individuals to be matched, as work takes place in a group.

Group mentoring / action learning

Three meetings of the action learning set were held at two week intervals, each lasting two and a half hours. The first session focused on explaining the principles of action learning.

A confidential questionnaire was used, as was the 'check-list'. There was no formal agreement with mentees.

Attendance was less than had been expected, with only three participants at the first meeting. The group as a whole flagged up a range of issues that were of concern to them, and found that they had much in common. One of these had an opportunity to present their issues to the rest of the group.

The second session was better attended, with five taking part. Community First's Community Buildings Adviser also attended, and was available to answer questions, although the framework for the session remained that of action learning. At the second session, attended by five chairs, a further two people presented their issues.

The third and final session was attended by five people. The three who had not presented their issues before, did so at this session. At the end of the session, the group looked at the check-list they'd filled in on the first day, to see if there were any changes in their perceptions since then. Only one participant managed to attend all three sessions.

Cost

Small group mentoring	
Set-up resources	Time / cost
Develop promotional materials, recruit participants, recruit appropriate facilitator, find venue.	Variable – likely minimum 9 days, but potentially more
Ongoing resource to run small group mentoring per group of 6-8	Time / cost
Preparation	1 day
3 half day sessions	1.5 days
2-3 hours per session for further preparation and follow-up	1 day
Room hire £15-£20 per session	£45-£60
Total ongoing resources for group of 6-8 people	3.5 days, £45-£60

Community First suggests that a 'cascade' approach could be used with all members of a set being trained in Action Learning, and perhaps one or more of the group taking responsibility to facilitate where needed, having received additional training to do so. (It was not feasible to test this 'cascade' approach as part of the pilot.) However, anecdotal evidence from other action learning sets indicates that groups working without a facilitator find it challenging to sustain themselves.

Results

All six participants were very positive about their experiences. Meeting people in similar roles was particularly valued.

"What were the key benefits? Meeting with others in similar roles. Working out where our problems are, and finding ways to overcome these. Realising that I'm not the only one".

Participant in Community First's small group mentoring

4.3 Peer-to-peer e-mentoring: Charity Trustee Networks

The pilot programme was run by CTN. It was aimed at chairs and vice-chairs anywhere in the UK.

Approach / model

The chosen approach was peer-to-peer e-mentoring. Suitable pairs were introduced and invited to develop a relationship electronically, principally by e-mail.

Rationale for chosen approach

A key factor in the choice of e-mentoring was sustainability. CTN hopes e-mentoring can be easily replicated and grown and intend to offer it as a service. Once a sizeable e-network is established, it will become possible to link chairs to others in their local area, and allow face-to-face meetings.

Profile

22 chairs expressed an interest to CTN. Of those who showed an interest:

- 9 followed up and asked for an e-mentor
- 6 were asking on someone else's behalf or were interested in finding out more about the concept to implement in their own organisation
- 1 found an alternative mentoring opportunity

Process

Planning and preparation

CTN approached the Mentoring and Befriending Foundation to discuss models of mentoring. CTN's Chief Executive worked with a consultant with practical and academic understanding of mentoring programmes, and particular expertise in peer-mentoring to develop a model for the pilot.

Issues considered included:

1. E-mentoring: can it be effective without a face-to-face meeting?
2. What training, advice or guidance to participants is needed?
3. How does the e-mentoring relationship need to be monitored?
4. Can co-mentoring work through e-mentoring?
5. The challenge of participants who want answers to specific legal, financial and technical questions
6. What matching processes should be undertaken?
7. Should there be a specified time for the relationship to continue or a fixed review time?

It was agreed that the best model would be a 'light-touch' introduction service for chairs, to link them up with another appropriate chair and to allow them to progress the relationship on their own terms. Examples of mentoring agreements largely from educational contexts were considered. It was agreed that confidentiality was the only imperative and that, beyond that, chairs should be given guidance on how to set up the parameters of their relationship and left to do this themselves. With a light-touch mentoring relationship, asking chairs to sign up to a formal mentoring agreement was not felt necessary. CTN also worked with a computer consultancy to develop a web area for chairs.

Recruitment

The e-mentoring pilot was promoted on CTN's website www.trusteenet.org.uk, on the Governance Hub website www.governancehub.org.uk, via an e-mail to chairs on CTN's database and at a CTN lunch for chairs.

Matching process

CTN staff took responsibility for the matching of chairs, based on the areas of need and experience identified by the chairs themselves.

Mentoring

CTN provided an introduction service for mentor pairs and then sent them guidance on mentoring and making it work. Chairs were encouraged to agree between themselves their expectations, how and when they would contact each other, boundaries for the relationship and a point at which the relationship should be evaluated. The only inflexible rule was that the participants in e-mentoring must respect the confidentiality of any matters discussed during the relationship.

Cost³

E-mentoring	
Set-up resources	Time / cost
Agree model and draft specification for web-development. Write content for website, mentoring guidance notes and agreement for participants.	3 days
Web development costs NB. E-mentoring need not be web-based, which would cut down on development costs. Sign-up, matching and introductions could be made by e-mail	£500 (on existing website – would be greater if developing website from scratch)
Ongoing resources to run e-mentoring	Time / cost
Recruitment	2 days
Staff time to match participants	1 day a month for up to 20 participants
Staff time to deal with technical or relationship problems	1 day a month
Monitoring and review	1 day
Total ongoing resources for 20 + people	5 days

³ The actual pilot costs were higher. This table indicates likely costs using the materials now developed and available on the Governance Hub website. CTN is also willing to discuss their experiences with others.

Results

Evaluation results are not yet available. It became clear that e-mentoring relationships could not be progressed at the same pace as the facilitated mentoring programmes. As the e-mentoring service is continuing beyond the date of the pilot, CTN will be undertaking an evaluation when the mentoring relationships have had sufficient time to develop, which will be published.

“Chair mentoring offers the support and understanding of someone who has experienced the role themselves. Having someone to hand who has no hidden agenda, with whom it is safe to share thoughts and concerns which it might not be appropriate to declare to fellow trustees and/or senior management. Another benefit is the reassurance of having someone there who has the interests of the mentee at heart, a ‘critical friend’.”

Participant in CTN discussion on chair mentoring quoted in CTN report

4.4 Co-mentoring: Centre for Charity Effectiveness

The pilot programme was run by the Centre for Charity Effectiveness. It was focused on chairs of national organisations in the Greater London area. Positive efforts were made to ensure diversity within the group.

Approach / model

The chosen approach was co-mentoring. The guiding principle of this model is that participants are equal partners in the mentoring. They can expect both to mentor their partner and to be mentored by them. Whilst both partners will bring unique skills and experience, they are both able to draw on the experience of chairing a voluntary organisation.

Rationale for chosen approach

The reasons for adopting co-mentoring were both philosophical and practical. On the philosophical side, co-mentoring values the capacity for learning which motivates adults, enabling them to draw on their own and others work and broader life experience (both the similarities and the differences) as the basis of learning.

On the practical side co-mentoring is likely to be scaleable and replicable. Both parties volunteer their time, so cost is not a big issue. The common problem of an imbalance in the numbers and profiles of mentors and mentees which occurs with classic mentoring schemes does not arise. Consequently there are fewer disappointed applicants.

Profile

26 Applicants were recruited. 20 people attended the initial briefing and matching meeting. The majority of participants were aged 45-59 years old. The group was well balanced in terms of its gender split, with substantial representation of BME groups, and in terms of its wide range of experience of trusteeship.

Process

Planning and preparation

Time was taken to prepare and distribute promotional material, to plan and organise two plenary meetings with participants, and to devise an appropriate matching technique. A mentoring guide was prepared and provided to all participants at the first meeting. Monitoring and evaluation processes were designed to assess the effectiveness of the pilot.

Recruitment

Publicity material was prepared and distributed two months before the start of the programme via personal networks, the Centre for Charity Effectiveness, the Governance Hub and Charity Trustee Networks websites. No restrictions or requirements were made about how new or experienced chairs were, nor about the size of their organisation or board. Although the flyer included information about dates, and the commitment needed, there were nonetheless a substantial number of enquiries to discuss the programme, which was time-consuming for staff.

Matching process

After some deliberation as to the best method for the matching process, it was agreed that participants should select their own partners at the initial briefing meeting. The four corners of the room were identified as representing the four parts of Greater London (N,S,E,W) and people were asked to group themselves **ONLY** on the basis of geography i.e. where they wanted to hold their meetings. They were tasked with talking to a variety of those present in their 'corner' in order to find a suitable partner. Some people paired off very quickly, whereas others took time to find appropriate partners. The final groupings were seven pairs and two sets of three co-mentees.

Co-mentoring

1. The initial meeting brought all participants together to:
 - explain the principles of co-mentoring
 - explain the objectives and timetable of the pilot programme
 - select a co-mentoring partner
 - practise co-mentoring
 - understand the expectations of participants
2. Co-mentoring pairs were asked to meet three times in the next three months.
3. A follow-up e-mail was sent within seven days of the first meeting, to provide encouragement and to keep in touch. The project organisers could be contacted by e-mail to offer advice if problems arose. No problems arose for which participants sought support from the project organisers. A reminder e-mail was sent a week before the concluding meeting.
4. A concluding meeting was held to review with participants their co-mentoring experiences, and how these compared to their initial expectations.

Cost

Co-mentoring	
Set-up resources	Time / cost
Development costs: agree model, target audience, plan plenary sessions; develop resource pack for participants	9 days
Ongoing resources to support a group of 20 people	Time / cost
Marketing and recruitment activity	2 days
2 half day plenary sessions inc. lunch	2 days (2 facilitators @ 1 day each)
Room hire (x2)	£200 room per session
Catering (x2)	£330 per session (22 @ £15)
Follow-up contact with participants	1 day
Review and evaluation	1 day
Total ongoing resources for 20 people	6 days and £1,060 costs

Results

Participants were asked at the beginning of the programme, what they had hoped to get out of mentoring. At the end of the programme, they were reminded of what they had said and asked whether the project had helped a lot, a little or not at all. Of the thirteen chairs who attended the final session twelve responded that the project had helped them a lot, one that it helped a little.

"I found the experience a positive one, particularly breaking down the isolation I felt as a chair. My co-mentors were supportive and offered a confidential sounding board for my concerns. We have decided to continue with the co-mentoring".

Participant in CCE co-mentoring pilot

5. Learning points from the pilots

5.1 What were the needs of those seeking mentoring?

Three types of need were identified across the four pilots:

- problem orientation
- development focus
- emotional support

The chairs recruited to the one-to-one and e-mentoring pilots were initially focused primarily on specific issues or a problem that they hoped to resolve. The chairs recruited to the co-mentoring pilot almost all expressed their hopes in terms of personal development. Only one was seeking to resolve a particular issue. Those recruited to group mentoring probably had the least clearly defined initial expectations. Emotional support was mentioned by some participants at the outset, but was more often referred to appreciatively in evaluation.

▲ *People were most likely to acknowledge needing support with a specific problem or with development, though comments showed they valued highly the emotional support they received.*

5.2 Who might come forward for mentoring? ⁴

Each pilot had a different target audience. Nonetheless, it is useful to understand the profile of the groups who showed interest in mentoring. In all three pilots, most of the participants were in the 45 to 59 age group. More men than women came forward. The one-to-one and small group mentoring groups were slightly older with fewer of the group in full-time employment. Most of this group chaired local organisations, whilst 50% of the co-mentoring sample chaired organisations with a national remit. The one-to-one and small group mentoring participants were from smaller organisations, both in terms of turnover and number of staff. Indeed, only 3 of 13 had a full-time chief officer, compared to 14 out of 17 in the co-mentoring sample. The one-to-one and small group mentoring group were less well informed about their role than their co-mentoring counterparts. Only 1 had any form of induction or training in their role as chair compared to 7 out of 19 of the co-mentoring group. There was considerable homogeneity in the types of paid employment of the co-mentoring sample; almost the entire group had business or managerial roles.

▲ *There is interest in mentoring regardless of the size, resources or remit of the organisation. A range of different age groups were represented in the pilot programme, though most were in the 45 to 59 age group. Managers and business people (or those who have retired from these occupations) are likely to be a receptive audience.*

⁴This does not include CTN's e-mentoring pilot.

5.3 Does personal referral help recruitment?

A number of co-mentoring participants mentioned that they took up the opportunity because their CEO had given them details of the programme. In contrast, Community First found that where one-to-one or small group mentoring was suggested to chairs, or chairs were referred to Community First, there was no take-up from these sources. A number of co-mentoring participants mentioned that they had joined the scheme because of the reputation of the Cass City University Business School.

▲ *It is not clear whether referral makes a difference – but the reputation of the organisation is a relevant factor for some.*

5.4 Do different mentoring approaches suit particular needs?

The pilot programme helped to reveal the strengths and weaknesses of different approaches:

One-to-one Over the course of the relationship most participants sought both business solutions and development. The professional advisers were able to meet both needs.

Co-mentoring Most participants sought personal development and were comfortable with self-direction. The extent to which co-mentees could help with specific problems was essentially a matter of lateral thinking and chance.

Group mentoring Initial meetings focused on specific problems. The paid staff were able to respond especially given the shared agenda of many participants.

E-mail mentoring Most participants had a problem focus. This was the criterion used by CTN to match participants. The pilot was too short to assess how development and emotional support needs were met.

▲ *The table below summarises the relative strengths of the different approaches based on the (limited) experience of this pilot programme.*

Approach	Need		
	Business solution/ problem focus	Development	Emotional support
One-to-one	✓ ✓ ✓	✓ ✓ ✓	✓ ✓ ✓
Co-mentoring	✓	✓ ✓	✓ ✓ ✓
Group mentoring	✓ ✓ ✓	✓ ✓	✓ ✓ ✓
E-mentoring	✓ ✓	✓	✓

5.5 Matching process

Deciding how to match participants is a key design decision in terms of practicality and likely success of the matches. There are many criteria that could be used to match participants: geography; size of organisation; time as a chair; purpose of organisation; issues of current concern. The participants in the co-mentoring programme agreed that one of the most important elements of a successful mentoring programme was that 'the chemistry has to be right'. Of course chemistry is the intangible ingredient that organisers have least control over! The co-mentoring pilot was the only one that enabled people to choose their mentoring partners face-to-face and this allowed individuals to have some feel for 'fit'. It was clear however that there was quite a high degree of anxiety about the process – with participants anxious about whether they would make the right choice; there may also have been the fear of rejection. Some felt they should have had biographies in advance or an opportunity to have a 'speed date' of some kind. The organisers' view was that when co-mentoring selection is conducted face-to-face, a degree of discomfort is inevitable. If not conducted face-to-face, it is important to give people the opportunity to opt out if there is a definite lack of rapport between the partners.

▲ *The matching process is a challenge to get right. When conducted face-to-face some awkwardness is probably inevitable. You can help reduce anxiety by allowing time for the process and showing confidence. It is worth stressing that ultimately the attitude of the learner is crucial to success.*

5.6 The cost to participants

Because the programme was funded by the Governance Hub, participation was free of charge. The one-to-one and small group mentoring participants were asked about their attitudes to paying. Of those participants in the group mentoring who responded to this question, there was a willingness to pay from £10 to £50 per session. (It should be noted however that there were recruitment problems to this programme, and this willingness to pay may not be shared among people who have not experienced group mentoring.)

The participants in the one-to-one mentoring scheme were asked if £45 per hour represented value for money and how much the organisation might be willing to pay. Most felt £45 was value for money, but were unsure whether their organisation would be willing to pay. Charging participants would of course improve financial sustainability, but would increase the recruitment challenge (perhaps particularly for less familiar forms of mentoring).

The issue of covering travel costs was raised in the co-mentoring pilot programme. Several participants said they would find it difficult to ask their organisation to fund the cost of travel, where this was substantial.

17 of the 43 participants (excluding e-mentoring participants) reported that their board had a budget specifically for board needs, but only four had a budget specifically for the chair.

▲ *As a free scheme, the pilot programme does not offer evidence of how much participants are willing to pay, if anything. For some, costs are likely to be a significant obstacle.*

5.7 Cost of different approaches

The table compares the set-up and ongoing costs for the different approaches for a group of 20.

	Set-up resources (time / costs)	Ongoing resources (time / costs) to support a group of 20 people
E-mentoring	3 days and £500 costs	5 days
Co-mentoring	9 days	6 days and £1,060 costs
Small group mentoring	9 days	10.5 days and £135-£180 costs
One-to-one mentoring	7 days	33 days and £1,200 costs

Travel costs are excluded. Room hire was a significant expense for three of the pilots but varied widely according to where the pilot was held. The expense figures should be adjusted to reflect local costs. Fuller information for each pilot is given in Section 4.

▲ **Peer-to-peer e-mentoring is the lowest cost model of those piloted. One-to-one mentoring using professional paid advisers is the most expensive.**

“Hearing by chance about the pilot project made me aware of the need for – and lack of – support, guidance and training for chairs. In its absence, the likelihood is that the role is diminished or underestimated, to the detriment of the organisation and the dissatisfaction or stress of the chair.”

Participant in one-to-one mentoring

“The relationship I have developed with my co-chair has certainly enabled me to ‘do what I do – but better’ and meetings have had a positive and reflective outcome with results at board level to show for it. We have both agreed that we will continue to be there for each other even after the end of the pilot scheme.”

Participant in co-mentoring pilot

6. Conclusions

- The pilot programme confirmed that there is demand among chairs for mentoring support. However in all pilots recruitment activity was a significant part of the set up effort. The need for marketing should not be underestimated.
- The pilot programme suggests the chairs that come forward are likely to:
 - have a specific issue or need
 - have a strong interest in personal development.

The former are most likely to benefit initially at least from some form of 'expert' intervention. The latter showed high levels of motivation and self-confidence and hence were well-suited to co-mentoring.

- It may be necessary to develop pathway activities for less confident chairs to encourage them to take up mentoring support, especially co-mentoring and peer mentoring approaches. This could include involvement in chairs networks. Financial support may also be needed.
- Mentoring programmes are continuing to evolve and there are many different approaches. The pilot suggests that each of the approaches tried could offer benefits for chairs. If you are planning to establish a mentoring scheme do not be afraid to think broadly and imaginatively about how to put mentoring into practice in a way that best suits your target audience.
- The chairs involved in the pilot programme were very appreciative of the mentoring opportunities they received and even in the short length of the pilot programme reported benefits from the experience.

7. Resources and further reading

7.1 Planning checklist

Appendix 1 The questions in Appendix 1 can be used to help you identify the issues you need to consider when developing a mentoring scheme.

7.2 Examples from the pilot programme

The appendices include examples of materials used in the Governance Hub pilot programme:

Appendix 2 An introduction to the GROW model, an approach common in mentoring and used in the one-to-one and co-mentoring pilots.

Appendix 3 Co-mentoring practical pointers. This guidance was part of a pack of materials given to participants in the co-mentoring pilot.

Appendix 4 A model learning agreement – this agreement was used in the one-to-one mentoring pilot.

Full reports of the pilots have been produced by the three organisations taking part and are available on the Governance Hub website www.governancehub.org.uk. Charity Trustee Networks is continuing to offer e-mentoring and is happy to share its learning with others. Enquiries to CTN are welcome.

7.3 Additional resources

Enhancing trusteeship through mentoring, Tesse Akpeki and Arthur Brown, 2001, NCVO

Everyone needs a mentor, David Clutterbuck, 2004, CIPD

Issues in mentoring, T. Kerry and A. Shelton Mayes (eds), 1995, Routledge

Implementing mentoring schemes – a practical guide to successful programs, Nadine Klasen with David Clutterbuck, 2003, Butterworth-Heinemann

Techniques for coaching and mentoring, David Megginson and David Clutterbuck, 2004, Butterworth-Heinemann

The mentoring manual, Mike Whittaker and Ann Cartwright, 2000, Gower

The Coaching and Mentoring Unit (CMRU) at Sheffield Hallam University provides several research report on mentoring on its website:

www.shu.ac.uk/research/ciod/3/index.html

Appendix I *Issues planning checklist*

Use this list of questions to help you plan:

1. **Target audience**

Who is your target audience? Are they likely to be problem focused, looking for emotional support, or interested in personal development? Can mentoring help meet these needs? If so, which approach is most appropriate?

2. **Resources**

What resources do you have available

- a) to set up
- b) to undertake marketing and recruitment
- c) to sustain the mentoring programme?

Does your organisation have a strong reputation that will help attract people to the programme? Are there partners you can work with who may be able to help e.g. to provide access to rooms or because they are better known? Will you be able to pay travel expenses for participants?

3. **Recruitment**

How will you reach your target audience? What selection criteria will you use? If you are recruiting mentors, how will you ensure they are appropriate, and will you provide training?

4. **Training**

What training will you provide? What training materials will you offer mentees or potential mentors if using a cascade model? Will they be delivered in print, online or face-to-face?

5. **Matching process**

How will you match people?

6. **Formalities and ground rules**

What safeguards will you put in place? Will you provide standard agreements or encourage participants to develop their own ground rules?

7. **Ongoing support**

What ongoing support can you provide, especially if there are problems in the relationship?

8. **Risk management**

What risks are there for your organisation and for the individuals taking part? How will you manage these risks?

9. **Monitoring and evaluation**

How will you keep track of progress and measure the success of the programme?

Appendix 2 *The GROW model*

The GROW model developed by Graham Alexander and championed by Sir John Whitmore is frequently used in coaching and mentoring. The GROW model outlines four stages to use to explore the issues facing a mentee. The 4 stages are;

Goal – what are you hoping to achieve?

Reality – an analysis of your situation

Options – what are your choices?

Will – what actions do you commit to taking?

Mentors help their partners to move through each stage of the GROW model, exploring the 'geography' of their situation. They do this by asking questions which enable people to unpack the difficulty or challenge that is being addressed.

GROW model sample questions

The example questions below are open-ended and designed to encourage exploration; they are also non-judgemental and do not suggest solutions. Adapt them to find your own style and what works best.

Goal:

- What do you want to work on?
- What is the long-term goal or outcome? (remember to express this as something you WANT rather than something you don't want)
- How far can we get today?

Reality:

- What is the current situation?
- What is your concern? What obstacles do you anticipate?
- On whom does this impact?
- What control do you have? What have you done to date?
- What skills, knowledge and experience do you have to apply to this task?
- Who else can help you achieve this?

Options:

- What approaches can you take to deal with this?
- Describe them; are there any other options?
- Can you deal with some parts of one of the options? If so which?
- What would you do differently if you were starting today?
- What are the benefits and limitations of each strategy you have identified?

Will:

- Which approach will you take? Why?
- When will you start? When do you hope to finish?
- How will you know a) that you have finished and b) that you have been successful?
- What are you worried about in terms of achieving your goal? How can you minimise these concerns?
- Who will you ask to help you? What support systems can you put in place?
- How committed are you to this course of action? What can you do to increase your commitment?

Used in CCE co-mentoring pilot, based on work developed by A Forrest

Appendix 3 *Co-mentoring – practical pointers*

The mentor's role

Each of you will be by turn both a mentor and a mentee. As a mentor, your ambition should be to act as a sounding board, ask demanding questions that help your partner to explore the issue; constructively challenge assumptions, but without defining the solutions

A place to meet

Ideally, mentoring meetings should take place on neutral territory – it will help you to focus, avoids the intrusion of telephones, staff and 'other things to do'. It will also help to create a sense of critical distance from the pressures of the rest of your life or workplace.

Comfortable, relaxed and relatively private surroundings are essential.

The first meeting

The first meeting will include a mutual sharing of experience and background – to build confidence and trust – and to give you an appreciation of each others current situation and past experience. This first exchange will probably take about 1½ to 2 hours. The objective will be for you both to begin to define the work you want to do.

The contract

You need to discuss and agree on the following:

- the location of your meetings
- how long they will last – suggested this be no less than 1½ hours
- the structure of the meeting
- dates for at least the next three meetings
- confidentiality
- how long you want to commit to this co-mentoring (one year is a common length).
This is obviously renewable by mutual agreement.

Contact between meetings

Agree also on the level of contact or support you want to offer each other between meetings – for example do you want to have a telephone call or e-mail correspondence between meetings? If yes, what are the ground rules about the maximum length of calls or number of e-mails? Do you want to use a mobile or landline? Do you only want to use Skype or only talk after 6pm etc.

Preparing for meetings

Discuss the way in which you want to prepare for meetings. You may decide to e-mail each other ahead of the meeting, saying what you want to focus on in your slot.

The structure of the meetings

In order to get the most out of this short programme, we would like you to use the following structure for your meetings. (This will also help us to discover what works and how to generalise your learning so other chairs can benefit.)

Structure:

1. Personal catch-up
2. Update on your board and organisation news
3. Allocate an agreed amount of time for each of you
4. Use the following points to begin:
 - Remind your partner (and self!) of what you decided to try/do/explore etc at your last meeting
 - Describe what you have accomplished since the last meeting
 - Describe what you intended to do but have not managed
 - Say what challenges or problems you are now facing
 - Say what issue/problem etc you want to use this meeting to discuss
5. Work with and through one or more stages of the GROW model to explore how best to manage your circumstances. *Take at least 20 minutes each for this stage. Repeat steps 4 and 5 for your partner.*
6. Allow enough time at the end to reflect on how the session went, including:
 - What worked well/better than last time?
 - What was not helpful or could be better?

Make notes – they will help you to embed the learning and will enable you to contribute more fully to the project at the evaluation stage.

Used in CCE co-mentoring pilot; developed by Ruth Lesirge

Appendix 4 *Chairs' mentoring agreement*

Chairs' mentoring agreement:

Name of chair (mentee):	
Name of mentor:	

The above mentoring partners agree to enter into a mentoring relationship under the following conditions:

1. Confidentiality:
We agree to protect each others' privacy and understand that all personal information disclosed during mentoring sessions will be kept strictly confidential.
2. Frequency/duration of meetings:
We agree to meet face-to-face for a minimum of ____ hour(s) every ____ month(s)/week(s) for a maximum 6 sessions, starting from and including the date of this session.
3. Telephone and e-mail (please delete if not applicable):
The mentor agrees to be contacted by telephone between meetings on the following number ____; and by e-mail at the following address ____
The mentee agrees to be contacted by telephone between meetings on the following number ____; and by e-mail at the following address ____
4. Roles and responsibilities⁵:
As a coach-mentor I aim to encourage you to take responsibility and control for your own learning. I will aim to support you by:
 - Being reliable in keeping appointments and monitoring the length of our sessions
 - Avoiding making assumptions or being judgemental but nevertheless asking challenging questions
 - Helping you explore options – the advantages/disadvantages of different courses of action (sometimes perhaps offering options for you to consider based on my own experience)
 - Encouraging you to reflect on specific experiences in order to learn from them
 - Encouraging you to set learning, development and business objectives
 - Helping you to identify, prioritise and plan how to meet your development needs
 - Giving constructive feedback as and when appropriate
 - Helping you to establish what further help you want/need and how you might access it

⁵ Adapted from the Oxford School of Mentoring and Coaching's 'Draft Contract and Summary of Beliefs'.

5. In turn, I ask that you will:

- Make time for our coaching and mentoring sessions
- Be honest and open in your conversations
- Be committed to take responsibility for your own learning
- Reflect on the outcome of mentoring sessions and feedback relevant issues for discussion at the next session
- Provide feedback at the end of the sessions in order to inform our own learning re potential benefits of the programme

6. Costs:

The mentoring scheme is currently being funded by the Governance Hub as a pilot aimed at supporting chairs; and also in providing a 'toolkit' based on our learning to other organisations like ours who may wish to set up a mentoring scheme. Therefore there is no charge to mentees under this programme; in return, we ask for feedback from you (please see Roles and Responsibilities above) to inform our learning.

7. Feedback:

Constructive feedback is encouraged at all times; in the event of a complaint on behalf of the mentee, Community First has a complaints policy that provides guidance on how to proceed. If the issue cannot be resolved informally with the mentor, the director of resources & organisational development at Community First should be contacted in the first instance.

8. Disclaimer:

Whilst we encourage the open exchange of information between mentors and mentees, Community First cannot guarantee or endorse any information received by either mentor or mentee during this programme. No liability shall pass to the mentor or mentee in respect of advice or information given during the mentoring relationship.

9. Termination:

This agreement may be terminated by either party without notice, providing that each side is informed of the reasons involved in the termination. All existing documents and/or resources pertaining to mentor/mentee will be returned to the person concerned as soon as the mentoring relationship is ended.

Signature (mentor) _____ Date _____

Signature (mentee) _____ Date _____

(In triplicate: copies to mentor, mentee and Community First project manager)

Used in Community First's one-to-one mentoring pilot

