

## HefmA Coaching and Mentoring Guidance

Thank you for agreeing to join the HefmA Coaching and Mentoring Register. Whether you are a new or highly experienced coach/coachee or mentor/mentee we hope that you will find your involvement personally rewarding, positive and developmental.

**What is coaching?** Developing a person's skills and knowledge so that their job performance improves, hopefully leading to achievement of organisational objectives.

**What is mentoring?** Mentoring is primarily about developing capability and potential in the role rather than performance and skills.

We have drafted this guidance to coincide with the launch of the Coaching and Mentoring Register and we hope that you will find them beneficial, even if it is just a reminder about the benefits of being in a coaching or mentoring relationship.

**A reminder about the role of a Coach and Mentor** Coaching and mentoring are development techniques based on the use of one-to-one discussions to enhance an individual's skills, knowledge or work performance. It's possible to draw distinctions between coaching and mentoring although in practice the two terms are often used interchangeably. The key difference tends to be a requirement for coaches to undertake formal training before engaging as a coach. Mentors tend to be qualified through experience.

**What is coaching?** Coaching targets high performance and improvement at work and usually focuses on specific skills and goals, although it may also have an impact on an individual's personal attributes such as social interaction or confidence. The process typically lasts for a relatively short defined period of time, or forms the basis of an on-going management style.

Although there's a lack of agreement among coaching professionals about precise definitions, there are some generally agreed characteristics of coaching:

- It's essentially a non-directive form of development, though this isn't a hard and fast rule.
- It focuses on improving performance and developing individuals' skills.
- Personal issues may be discussed but the emphasis is on performance at work.
- Coaching activities have both organisational and individual goals.
- It provides people with feedback on both their strengths and their weaknesses.
- It's a skilled activity, which should be delivered by people who are trained to do so. This can be line managers and others trained in basic coaching skills.

**What is mentoring?** Mentoring involves the use of the same models and skills of questioning, listening, clarifying and reframing associated with coaching. Traditionally, however, mentoring in the workplace has tended to describe a relationship in which a more experienced colleague uses his or her greater knowledge and understanding of the work or workplace to support the development of a more junior or inexperienced member of staff.

One key distinction is that mentoring relationships tend to be longer term than coaching arrangements. In a succession planning scenario, for example, a regional finance director might be mentored by a group level counterpart over a lengthy period to develop a sound

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understanding of dealing with the boardroom, presenting to analysts and challenging departmental budgets, all in a supportive environment.

Mentoring relationships work best when they move beyond the directive approach of a senior colleague ‘telling it how it is’, to one where both learn from each other. An effective mentoring relationship is a learning opportunity for both parties. This is particularly productive when used to encourage inclusive working practices and equal opportunities, for example where a senior female or ethnic minority leader mentors a more junior colleague from a similar background. Reverse mentoring (where a more junior colleague mentors a senior leader) can also be effective in encouraging sharing and learning across generations and/or between role levels.

<b>Mentoring</b>	<b>Coaching</b>
<i>Ongoing relationship that can last for a long time</i>	<i>Relationship generally has a short duration</i>
<i>Can be more informal and meetings can take place as and when the mentored individual needs some guidance and or support</i>	<i>Generally more structured in nature and meetings scheduled on a regular basis</i>
<i>More long term and takes a broader view of the person. Often known as the ‘mentee’ but the term client or mentored person can be used</i>	<i>Short-term (sometimes time bound) and focussed on specific development areas / issues</i>
<i>Mentor usually passes on experience and is normally more senior in organisation</i>	<i>Not generally performed on basis that coach needs direct experience of clients formal occupational role</i>
<i>The focus is on career and personal development</i>	<i>Focus generally on development/issues at work</i>
<i>Agenda is set by the mentored person with the mentor providing support and guidance to prepare them for future roles</i>	<i>Agenda focused on achieving specific, immediate goals</i>
<i>Revolves more around developing the mentee professionally</i>	<i>Revolves more around specific development areas/issues</i>

### When is a coaching or mentoring relationship not appropriate?

A coach or mentor should **NOT** replace line management. Coaching and mentoring interventions are generally concerned with the practical issues of setting goals, skills development and achieving results within specific time-scales. Coaching is not designed to seek to resolve an individual’s deeper underlying issues that are the cause of serious problems like poor motivation, low self-esteem and poor job performance.

Coaching and mentoring is generally commenced on the premise that individuals are self-aware and have selected coaching or mentoring because they do not require a therapeutic intervention such as counselling.

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**About the coaching and mentoring relationship** – personal responsibilities to keep in mind to ensure both parties get the best from the relationship:

- Arrange the venue and time – and keep to it
- Be prompt and always be prepared for the session (ensure that you carry out any actions agreed at a previous session)
- Respect your coach / mentor’s time
- Respect confidentiality
- Be open and honest
- Agree a coaching or mentoring ‘Agreement’ – an example is shown below

### Useful Frameworks – Mentoring

The following 3 step approach can be a helpful way to plan and develop your mentoring relationship. Alred et al<sup>1</sup> identify a simple model of mentoring which operates on a three stage basis:

- exploration – to explore issues which are identified by the mentored individual
- new understanding
- action planning.

In each stage there are responsibilities for both the mentor and the 'mentee'. The tables below focus on the main strategies and methods required of the mentor.

#### *Exploration*

<b>Strategies</b>	<b>Methods</b>
Take the lead	Listen
Pay attention to relationship and develop it	Ask open questions
Clarify the aims and objectives of mentoring	Negotiate an agenda
Support and counsel	

#### *New understanding*

<b>Strategies</b>	<b>Methods</b>
Support and counsel	Listen and challenge
Give constructive feedback	Ask open and closed questions
Coach and demonstrate skills	Recognise strengths and weaknesses
	Establish priorities
	Identify developmental needs
	Give information and advice
	Share experience and tell stories

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### Action planning

Strategies	Methods
Examine options for action and their consequences	Encourage new and creative way of thinking
Attend to the mentoring process and the relationship	Help to make decision and solve problems
Negotiate an action plan	Agree action plans
	Monitor progress and evaluate outcomes

### Useful Frameworks – Coaching

There are a number of useful frameworks to guide the Coaching relationship. The GROW (sometimes known as TGROW) Model is probably the best known coaching model in the UK and the one that is most widely used.

The GROW acronym stands for **G**oal, **R**eality, **O**pportunity, **W**ill/wrap up/what next? The Model provides a simple yet powerful framework of four main stages for a coaching session. During the first stage of a session, coach and coachee agree on specific outcomes and objectives, during the second stage, the coach works with the coachee to explore the reality of their current situation by using a range of techniques. In the third stage, options for action are chosen to move the coachee closer to their goal and in the final stage, the coachee commits to action.

<p><b>Goal</b></p> <ul style="list-style-type: none"> <li>• Agree topic for discussion</li> <li>• Agree specific outcomes</li> <li>• Set long-term aims if appropriate</li> </ul>	<p><b>Reality</b></p> <ul style="list-style-type: none"> <li>• Invite self-assessment</li> <li>• Offer specific examples of feedback</li> <li>• Avoid or check assumptions</li> <li>• Discard irrelevant history</li> </ul>
<p><b>Opportunity / Obstacles / Options</b></p> <ul style="list-style-type: none"> <li>• Cover the full range of options</li> <li>• Invite suggestions from the coachee</li> <li>• Offer suggestions carefully</li> <li>• Ensure choices are made</li> </ul>	<p><b>Will / Wrap up / What next / Way forward?</b></p> <ul style="list-style-type: none"> <li>• Prepare a plan</li> <li>• Identify possible obstacles</li> <li>• Make steps specific and define timing</li> <li>• Agree support</li> </ul>

The following pages of this guidance contain some useful templates and documents that may be useful.

## HefmA Coaching and Mentoring Guidance Useful Documents and Templates

**The Coach / Mentor Profile** You might find it helpful to develop a profile to show prospective coachees / mentees the type of areas in which you specialise or can provide support.

<b>Name:</b>		<i>Please submit a photo for your profile in jpeg or png format</i>
<b>Current Role:</b>		
<b>Location/organisation:</b>		
<b>Contact Details:</b>		
Telephone No:		
Work Mobile:		
Email Address:		
<b>Current Role:</b> (max 100 words)		
<b>Previous Role and Experience:</b> (max 100 words)		
<b>Professional Qualifications/Interests:</b> (max 50 words)		

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**Coaching / Mentoring Experience (max 50 words)**

**Any other useful information**

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### Coaching / Mentoring Methods – useful areas for exploration for coachees and mentees

1	Why did you become a Coach / Mentor?
2	What is your Coaching / Mentoring style?
3	How do you continue to develop yourself as a Coach / Mentor?
4	What business issues do you think you work best with?
5	How do you conduct your coaching / mentoring sessions e.g. in person, telephone, email, combination etc.
6	What's the appropriate frequency and duration of sessions?

**HefmA Coaching and Mentoring Guidance  
Record of Meeting**

**Date:** \_\_\_\_\_

**Summary of discussion**

**Actions Agreed**

Action	Owner	Date to be achieved

**Date of next meeting:** \_\_\_\_\_ **Time:** \_\_\_\_\_

**Venue:** \_\_\_\_\_





## Hefma Coaching and Mentoring Guidance Sample Mentoring Agreement

*Brainard, Harkus & George (1998)*

*Consider using this agreement, or another one that you and your mentor create together, if you believe the mentoring relationship will be strengthened by formalising a mutual agreement of roles, responsibilities, and expectations.*

We are voluntarily entering into a mentoring relationship from which we both expect to benefit. We want this to be a rich, rewarding experience with most of our time together spent in professional development activities. To this end, we have mutually agreed upon the terms and conditions of our relationship as outlined in this agreement.

### *Objectives*

We hope to achieve:

To accomplish this we will:

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### *Confidentiality*

Any sensitive issues that we discuss will be held in confidence. Issues that are off-limits in this relationship include:

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### *Frequency of Meetings*

We will attempt to meet at least \_\_\_\_\_ time(s) each month. If we cannot attend a scheduled meeting, we agree to notify one another in advance.

### *Duration*

We have determined that our mentoring relationship will continue as long as we both feel comfortable or until: \_\_\_\_\_

### *No-Fault Termination*

We are committed to open and honest communication in our relationship. We will discuss and attempt to resolve any conflicts as they arise. If, however, one of us needs to terminate the relationship for any reason, we agree to abide by one another's decision.

\_\_\_\_\_  
Mentor

\_\_\_\_\_  
Mentee

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## HefmA Coaching and Mentoring Guidance

Other useful sources of information, advice and guidance can be found by following the links below:

**The Chartered Institute of Personnel and Development** [www.CIPD.co.uk](http://www.CIPD.co.uk)

**The Coaching Network** <http://new.coachingnetwork.org.uk>

**The European Mentoring and Coaching Council (EMCC)** UK is part of the Europe-wide European Mentoring & Coaching Council, which exists to promote good practice and the expectation of good practice in mentoring and coaching across Europe. EMCC is an independent, impartial and non-profit making organisation. The website contains a wealth of information and signposts resources [www.emccouncil.org.uk](http://www.emccouncil.org.uk)

**Management Futures** the Management Futures website features links to helpful Podcasts for coaches and mentors <https://www.managementfutures.co.uk>

**In addition to the above, there are a number of publications that you may find helpful. A selection of these are detailed highlighted below:**

Flaherty, J., 2011. *Coaching – evoking excellence in others*. Oxon: Routledge.

Mcleod, A., 2009. *Performance coaching*. Wales: Crown House publishing Ltd.

O'Connor, J and Lages, A., 2004. *Coaching with NLP - a practical guide to getting the best out of yourself and others*. London: Harper Collins.

Rogers, J., 2012. *Coaching skills - a handbook*. 3<sup>rd</sup> ed. Berkshire: Open University Press.

Starr, J., 2012. *Brilliant Coaching*. London: Prentice Hall.

Whitmore, J., 2009. *Coaching for Performance*. 4<sup>th</sup> ed. London: Nicholas Brealy Publishing.

De Haan, E., 2013. *Behind closed doors*. Libri Publishing

Renton, J., 2009. *Coaching and Mentoring – What they are and how to make the most out of them*. London: Profile Books.