

**Module 2: Personal Identity in the Mentor-Mentee Interaction**

Module 2 Title	Personal Identity in the Mentor-Mentee Interaction
Module Aim	Clarify the nature of the relationship between the Mentor-Mentee relating to context, ethics, professional standard and the needs of the Mentee.
Units	<ol style="list-style-type: none"> <li>1. Use of the mentoring in a specific context</li> <li>2. Legal and organizational requirements and professional standards</li> <li>3. How to identify the client goals and outcomes</li> <li>4. Alternative sources of support for Mentee</li> </ol>
Learning outcomes	<p>At the end of these unit the learners will be able to:</p> <ol style="list-style-type: none"> <li>a) Understand the specific context in which they will work</li> <li>b) Apply legal and organizational requirements in a specific context</li> <li>c) Create a positive environment for the mentor-mentee relationship</li> <li>d) Facilitate the identification of the mentee's needs and goals</li> <li>e) Manage the end of the relationship and signpost the mentee to future support</li> </ol>
Learning activities	<p><b>Exercise 1:</b> Analyse the social needs of the local community and the benefits of mentoring in a specific context.</p> <p><b>Exercise 2:</b> Explain legal and organisational requirements and professional standards in a specific context relating to: data protection, privacy, confidentiality, safeguarding and disclosure.</p> <p><b>Exercise 3:</b> Identify and agree goals and outcomes with mentee; agree the methods for recording progress and achievements</p> <p><b>Exercise 4:</b> Explain the importance of establishing ground rules for engagement and boundaries and the role of the mentoring agreement in a mentoring relationship.</p> <p><b>Exercise 5:</b> Using the sample given, create a session plan that enables the mentor to structure the mentoring session and how future support will be sourced.</p>
Learning support materials	<p>Unit 1: What do we mean by “specific context”? Research the local social context of your program.</p> <p>Unit 2: What is the professional standard of mentor?</p> <p>Unit 3: Who identifies the needs of the client?</p> <p>Unit 4: Why is good to material support after mentoring?</p> <p><b>References: CMSI Initial Partner Context Report</b></p> <p>Community Mentoring good practices guide.</p> <p>Global Code of Ethics for Coaches and Mentors – <a href="http://www.emccouncil.org">www.emccouncil.org</a>.</p> <p>Project application Erasmus Plus Innovative Quality Mentoring for Social Inclusion</p>

## Unit 1: Use of the mentoring in a specific context

The general principles stress the importance of clarity in defining the mentor role. This clarity must also be extended to include a clear agreement between mentor and mentee. The initial needs assessment – Prior Skills Assessment.

The precise nature of the agreement will reflect the **context and purpose** of the mentoring – for example, the mentor will facilitate the outcomes of the mentoring relationship in the first instance, rather than the agenda set by the organisation. Whatever the context, an early agreement and understanding about roles, responsibilities and expectations of the mentor and mentee are crucial for success.

In drawing up the mentoring agreement, examples of best practice in all guidance emphasise the need for a discussion and agreement on what is expected within the relationship.

### Mentor – Mentee Expectations

The mentor should be professionally competent, has a current knowledge base, responds to needs, manages the process gives time in preparation, observation feedback, keeps confidentiality, and believes in the potential of the mentee.

The mentee should be realistic in expectations of the mentor, accepts their own responsibilities for the process, is willing to action plan or set the direction for self-assessment, is willing to be challenged, behaves appropriately towards the mentor keeps confidentiality.

All good mentoring relationships described in terms of the developmental model are reciprocal, based on trust and mutual respect, and will come to an end which is usually negotiated in advance.

The relationship and process will be characterised by a high degree of mutual learning – indeed, a prime benefit for the mentor is the intellectual challenge that opportunities for a *reflective space* will provide for self-development, continuing contact with practice networks and enhanced management skills.

The mentee will feel able to begin winding down the relationship as s/he is able to identify positive outcomes and celebrate success (however defined) within the process. The mentee will move to new sources of learning and opportunities for reflective practice as s/he is able to identify strategies for working through challenges and choices independently.

Overall, the establishment of clear goals and expectations in the agreement stage avoids conflict. Time given at the beginning of the process to thinking about the conduct of the relationship and its end will hopefully avoid the difficulties presented when, for example, a mentee might be overly dependent on the mentor, or confidentiality principles are not clearly understood.

Clarity is the essence, in the mentor mentee interaction. All parties in the mentoring process need a clear understanding of the precise nature of their own activity and their contribution to mentoring in a wider context.

**Exercise 1:** *Analyse the social needs of the local community and the benefits of mentoring in a specific context.*

## **Unit 2: Legal and organizational requirements and professional standards**

### **Organization's requirements**

The organization has an interest in allowing time for agreement process. Good organizational practice also suggests a management commitment to mentoring per se to the extent that there will be support systems in place such as mentor training, supervision and mentor meetings. Dedicated mentor group meetings could be useful in enabling mentors to establish their own support networks.

Moreover, the organization will facilitate appropriate participation of the mentor in the planning and organisation of the mentee's training in order to enhance the credibility and effectiveness of the mentor role. Again, the contribution of mentoring to overall quality of organisations cannot be ignored and is increasingly incorporated into management training for the mentee at all levels of continuing professional development. It should also be stated that the manager's role will be to ensure the effectiveness of the mentor by encouraging the support and co-operation of all colleagues relevant to the process.

### **Data protection & Privacy**

Confidentiality is paramount to professionalism and is an underpinning requirement for successful mentoring in that it promotes trusting relationships – a prerequisite for honest, constructive evaluation and self-assessment in supported reflective practice. All the information collected by the mentor has to be recorded in a document on which both parties have agreed on. The document has to include personal data and applies whether the information is held on computer or in paper-based record keeping systems. Therefore through this document organisation is legally responsible for the personal information they hold and requires organisations to collect and use information fairly, to store it safely and

not to disclose it to any other person unlawfully. To ensure that mentee's personal data are processed properly the mentor has to show constantly his notes during the mentoring to the mentee in order to keep the personal data processing transparency.

Mentors can only disclose information about clients to the third parties if the disclosure is fair, compatible with the purpose with which information is held and falls within one of the conditions for fair processing.

### **Professional standard**

The role of the mentor is to provide key collegial advice, assistance, and guidance to a mentee member as they undertake their practical work experience requirement and seek entry into full membership as a registered professional planner. Beyond this, both the mentor and the mentee member should benefit from the collegial nature of the mentorship through the exchange of ideas, sharing of experiences, and development of new perspectives.

The mentor must have as additional support a guide on which he can base on (*see Community Mentoring good practices guide.*) in his relationship with the mentee. As a mentor, you should meet with the mentee; you are mentoring every two months. These meetings should be in person or, if this is not feasible due to scheduling or geography, using technology such as teleconference, an instant messaging program or Skype. During these meetings, you will work cooperatively with the mentee to ensure s/he has a plan to achieve an acceptable level and range of the profession's competencies while s/he completes the practical work experience requirements.

Mentoring lasts a minimum of one year. It could be longer, as you must satisfy yourself that you and the mentee have achieved the goals of the mentoring. Please remember that mentoring is a two-way street, exposing you to the mentee's perspectives, experiences and knowledge. In addition to the formal mentorship, both parties may wish to meet just before s/he writes the professional examination, to review lessons learned and particularly to discuss 'public interest' and the profession's standards of competency, ethics and professionalism.

Ideally, mentoring should last until parties, mentor and mentee, are satisfied and s/he has fulfilled the expectations of the program. At that time, the mentor will be asked by the mentee to sign off on the Record of Mentoring, verifying that you are satisfied that, together, mentor and the mentee have met the program's objectives. The mentor should also sign and, if appropriate, comment on a record of each meeting. The mentee will prepare this record, and should send it to you shortly after each meeting. This allows the mentor to be more fully aware of mentee's progress.

In case that mentoring process is interrupt or the mentee want to change the mentor, the following aspects should be respected by both parties from the mentorship. If this happens, you will be asked to sign off on the period during which the two of you have worked together. The mentee retains any credit accumulated during the period the mentor had worked with him/her. It is the mentee's responsibility to notify the organizations if the mentoring arrangement is terminated in this way, and to identify a new Mentor.

*Exercise 2: Explain legal and organisational requirements and professional standards in a specific context relating to: data protection, privacy, confidentiality, safeguarding and disclosure.*

### **Unit 3: How to identify the client goals and outcomes**

Considering the role of the mentor (*unit 1*) identification of the mentee's needs should be the main objective from the mentoring starts. Therefore the next steps are crucial in mentoring process:

Analyze ways of identifying and agreeing outcomes and goals with clients

- Explain the role of a mentoring agreement
- Explain the importance of agreeing with the client records of interaction and progress towards agreed objectives and goals
- Analyze client responsibility and autonomy for making changes

All good mentoring contracts/relationships described in terms of the developmental model are reciprocal, based on trust and mutual respect, and will come to an end which is usually negotiated in advance. The relationship and process will be characterized by a high degree of mutual learning – indeed, a prime benefit for the mentor is the intellectual challenge that opportunities for a 'reflective space' will provide for self-development, continuing contact with practice networks and enhanced management skills.

*Exercise 3: Identify and agree goals and outcomes with mentee; agree the methods for recording progress and achievements.*

### **Unit 4: Alternative sources of support for Mentee**

When starting the mentoring it is important to establish that mentor and mentee have the same expectations and how the relationship will work for them. Moreover, the agreement on the ground rules of the mentoring process is the key for a successful mentorship. Discuss ways to end the relationship that are comfortable for mentor and mentee at the very beginning (including how to end the relationship early). This makes it easier at the end. At the end of the mentoring relationship, look back over the time and discuss what went well and what you might do differently

another time. Comment constructively on each other's handling of the role. After the mentoring is finished, it is useful for the mentee to have some alternative sources of support in order to manage the life's challenges.

How a mentor can give to his mentee alternative sources of support is through the discovering the main issues of the mentee. Considering the 'weak points' of the mentee, the mentor can create a list of motivational or inspirational books for reading which can help the mentee in future. Also, the mentor can suggest some workshops in order that mentee can be involved and so on. What is important to know from the beginning that how starts the mentoring also its ends, so the mentor during the mentoring should create the appropriate sources for the mentee.

**Exercise 4:** Explain the importance of establishing ground rules for engagement and boundaries and the role of the mentoring agreement in a mentoring relationship.

**Exercise 5:** Using the sample given, create a session plan that enables the mentor to structure the mentoring session and how future support will be sourced.

### Learning Support Materials

#### Exercise 5 - *Sample Session Plan*

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**Mentee Name**

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**Date**

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**Brief details of the session**

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**Self-reflection**

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**Possible future needs/requirements**

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