

Analysing the Need and Success of the Institute of Fundraising South West's Mentoring Programme Pilot

Version Eight – Final Draft

**Prepared for the Institute of Fundraising South West Regional
Committee**

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Executive Summary

The Institute of Fundraising South West (IoFSW) mentoring pilot took place between March 2010 and March 2011 and involved fourteen mentoring pairs from across the South West region. Both mentees and mentors gave their time voluntarily and subject to participants being individual members of the institute, there was no charge to participate. Whilst most mentoring relationships focused on fundraising issues, it was made clear throughout the pilot that mentoring's scope extended to the life of a mentee as a whole.

This evaluation examines the demand and need for mentoring in the South West region and the successful impact of mentoring on mentees, mentors and the charities at which mentees work. Reasons for success are also examined both in terms of the characteristics of mentoring relationships developed and the way in which the pilot was designed and delivered. The report also offers recommendations for future mentoring programmes, particularly in relation to sustainability.

Nineteen applications were received for fourteen mentee places. Furthermore, IoFSW met its target of obtaining fourteen mentor applications. Such application rates suggest a strong demand for mentoring in the region, for both mentee and mentor roles.

With respect to need, over 90% of mentees and over 75% of mentors felt the pilot offered development opportunities that they would have found difficult to obtain elsewhere.

In terms of measuring success, there was universal agreement amongst mentors and mentees that the pilot had been worthwhile, enjoyable and successful overall. Success was also shown by the fact that only one mentoring relationship ended prematurely and over 60% of mentoring pairs plan to continue their mentoring beyond the pilot.

For mentees, it was encouraging that the pilot appeared to have the greatest impact in the areas of greatest need – providing improved levels of support and increasing confidence levels. Furthermore, 90% of mentees felt the pilot had increased their knowledge of fundraising and improved certain skills required for their work. Although fundraising issues were the focus for many, 60% also stated that the pilot had helped clarify their career aspirations and over a third stated that it had had a positive impact in at least one area outside of work. Support for mentoring's success in developing mentees also came from relevant employers, with 100% believing that the pilot had aided their member of staff's development.

Although the focus of each mentoring relationship was the development of the mentee, analysis also suggests that mentors gained significantly from participation. Although all mentors were experienced fundraisers, 60% felt that the pilot had increased their fundraising knowledge and 75% felt it had improved certain skills that they require for their work. 60% also felt that the pilot had had a positive impact in at least one area outside of work.

Given the one to one nature of mentoring, an unexpected benefit of the pilot was its impact on developing professional networks and broader relationships. 85% of mentors and over 60% of mentees felt the pilot had improved their professional network.

Organisationally, all relevant employers felt that the pilot had brought tangible benefits to their organisations as a whole. Examples included the implementation of new fundraising channels, improving the success of their major donor fundraising and reducing the time/costs associated with fundraising research.

mch believes that the above successes were due in part to the quality of mentoring relationships that developed: there was a universal sense amongst participants that their mentoring relationship was a mutually respectful and trusted one.

Other factors that appear to have contributed to the pilot's success revolve around the pilot's design and delivery. Specifically, this report outlines the importance of nine key determinants for success:

1. Getting the right applicants
2. Deciding upon the right number of participants
3. Providing a comprehensive induction
4. Making the right mentor – mentee matches
5. Developing great mentors
6. Providing sufficient on-going support
7. Engaging participants in programme design
8. Delivering all aspects of the pilot in an effective and positive way
9. Conducting a sufficient number of one to one mentoring sessions

It also recommends specific changes that should be made to these determinants to improve future mentoring programmes.

It should be noted that responsibility for the ninth determinant ultimately falls to each mentoring pair. The average mentoring pair met seven to eight times during the course of the pilot and exchanged a further 20 emails/phone calls. Tellingly, analysis suggests that the higher the number of face to face meetings, the more likely participants are to 'strongly agree' that their mentoring has been successful overall, rather than just 'agree'.

With respect to future mentoring programmes, *mch* does not recommend any wholesale changes to content. *mch* believes that IoFSW can dramatically reduce the cost of the programme if its committee members are prepared to handle programme administration, deliver many of the compulsory sessions, organise peer gatherings and conduct core evaluation work. Fortunately, IoFSW has a pool of committee members with in depth knowledge of the programme on account of them either participating in the pilot or observing/assisting with its delivery. In addition to minimising costs, *mch* also recommends that IoFSW charges future mentees a minimum of £50 for the privilege of participating.

Overview of the Institute of Fundraising and the Institute of Fundraising South West

The Institute of Fundraising (IoF) is the professional membership body for UK fundraising. Its mission is to support fundraisers through leadership, representation, standards-setting and education, and it champions and promotes fundraising as a career choice. The institute has a network of national, regional and special interest groups. The Institute of Fundraising South West (IoFSW) is the institute's regional group for the South West of England.

One of the ways in which IoF aims to support its members is through the provision of development opportunities and feedback from members indicated a high level of interest in a structured mentoring scheme. Consequently, IoFSW decided to run a pilot mentoring programme in the hope that it would provide fundraisers from across the region with an opportunity to obtain experienced support with fundraising and management issues. It was also hoped that the pilot would inform the development of a UK wide mentoring scheme.

The IoFSW Mentoring Programme Pilot – At a Glance

What: The pilot offered a chance for participants to experience a one to one mentoring relationship. Each relationship involved regular face to face meetings between mentor and mentee, with the possibility for additional communication via phone, skype or email.

Who: All participants were individual members of the Institute of Fundraising and had the support of their employers to participate. All participants were involved in or had extensive experience of fundraising. The programme was managed jointly by Mark Hughes of the staff development and consultancy firm, *mch* and Amanda Oxford of IoFSW.

When: The formal application and selection process took place in January-February 2010, with the induction, matching and training of participants taking place in March 2010. Participants committed themselves to participating in the programme until March 2011. During this time, participants were supported by *mch* and IoFSW as required. It was left to each mentoring relationship to decide whether it wished to continue beyond March 2011 (without IoFSW/*mch* support) or conclude at this time. The expectation was that the mentoring would take place during normal working hours and this was largely the case.

Where: Participants were spread throughout the region from Truro in the West, Worcester in the North, Swindon in the East and Poole in the South. Matching sessions were arranged to try and increase the likelihood of mentors being matched with mentees in close geographic proximity. However, several matches involved geographically disparate pairings e.g. a mentor in Bath was matched with a mentee in Truro. The expectation was that mentees would travel to meet their mentors for face to face meetings; however each mentoring relationship was left to decide on meeting arrangements.

How Many: The pilot involved 14 mentoring relationships.

How Often/Long: The indicative guidelines were that each mentor and mentee would have a face to face meeting at least once a month over a 12 month period.

How Much Time: To accommodate the preparation for and attendance at regular mentoring meetings, participants were advised to commit four hours/month to their mentoring relationship. As detailed above, it was expected that the mentoring would take place during normal working hours. In addition, mentees had to attend one half day induction and one full day matching session and mentors had to attend the same two sessions, plus a full day's training.

How Much Money: There was no fee for taking part; however participants needed to ensure they were individual members of the Institute of Fundraising. Furthermore, participants had to be able to meet the travel expenses associated with the mentoring. Travel cost bursaries for mentees working for charities with an annual turnover of less than £300,000 were available from IoFSW. These bursaries were only taken up by one mentee for two trips. The total cost of the pilot was £18,250. This included all aspects of the design, delivery and evaluation phases. It should be stressed that a significant amount of time and expertise was given voluntarily by several members of the IoFSW committee throughout the pilot. Given the pilot's ability to be replicated, future programmes could be delivered at between a fifth and a sixth of the cost of the pilot, provided the level of voluntary support given by the IoFSW committee continues.

Mentoring Definitions, Characteristics and Benefits

Definitions

While mch and IoFSW were not 'tied' to any one definition of mentoring, they were mindful of and agreed with the following definitions when developing the pilot;

"Mentoring supports a plan. It requires a relationship built upon trust. Through the relationship, the mentor supports the mentee to achieve their plan."

The former charity, Believe

"Mentoring is a structured and trusting relationship that brings young people together with caring individuals who offer guidance, support and encouragement aimed at developing the competence and character of the mentee."

The US organisation Mentor/National Mentoring Partnership

"Mentoring is 'off-line' help by one person to another in making significant transitions in knowledge, work or thinking."

Mentoring Executives and Directors, Clutterbuck & Megginson

Scope, Focus and Characteristics of the Mentoring Relationship

A mentee enters a mentoring relationship with a desire to develop themselves as a person. Consequently, all areas of the mentee's life are potentially within the scope of the mentoring relationship. Ideally, the mentor is asked by the mentee (and if not asked is certainly willing) to assist in this development process. The focus of the mentoring relationship is on the development of the mentee. In practice, the mentor often learns as much from the mentoring relationship as the mentee, however this should be considered an 'added bonus' rather than a primary aim.

Summary of Mentoring from the Perspective of a Mentor

Focus	The mentee as a person
Role	Facilitator with no agenda
Relationship	Self-selecting
Source of influence	Power free relationship – mentor's influence proportionate to perceived value they bring
Personal returns	Affirmation/learning
Arena	Life

Source: <http://coachingandmentoring.com/mentsurvey.htm> Accessed 18th April 2007

Given the above scope, focus and characteristics, mentoring can incorporate relationships such as coaching, facilitating and advising. The extent to which these relationships are incorporated into mentoring is often determined by the individual circumstances of the mentee, the ground rules set at the beginning of the relationship and the skill and experience of the mentor.

The Essence of Mentoring and Qualities Required

Mentoring is first and foremost a one to one relationship. The qualities *mch* believes are required for successful relationships are listed below. Ultimately, success depends on both parties exhibiting the qualities outlined, however it often falls to the mentor to initiate and develop these qualities.

Trust

In *mch*'s view; four elements combine to create trust:

- Reliability
 - Promising what you do and doing what you promise
- Acceptance
 - Who you are is O.K. with me
- Openness
 - Sharing who you are and what you feel
- Congruence
 - Practicing what you preach

Respect

The mentee feels listened to and never feels patronised.

Mutuality

The mentee and mentor feel there is a genuine two-way dialogue between them.

Concreteness

The mentee and mentor know the relationship involves concrete inputs e.g. giving each other feedback or devoting a designated amount of time each week/month.

A willingness to be challenged

Both the mentee and mentor understand that the relationship is designed to challenge their needs, values, feelings, thoughts and behaviours.

A desire to make the experience fun

Although challenging, the mentee and mentor expect the relationship to be fun.

Beliefs required by the Mentor

In order to be genuinely effective, mentors need to believe that given the right support, everyone has:

- An inherent potential to learn and perform
- A desire to do their best

In addition, they must have a genuine belief in the value of mentoring.

Knowledge, Experience and Skills required by the Mentor

In addition to having sound IQ and appropriate fundraising skills and experience, mentors need to have high levels of emotional intelligence. *mch* considers Daniel Goleman's construct of emotional intelligence to be the most appropriate:

The Five Components of Emotional Intelligence

<u>Component</u>	<u>Definition</u>
Self-Awareness	The ability to recognise and understand your moods and emotions, as well as their effect on others
Self-Regulation	The ability to control disruptive impulses and moods – to think before acting
Motivation	A passion for work that goes beyond money or status. A propensity to pursue goals with energy and persistence
Empathy	The ability to understand the emotional makeup of other people. The ability to treat people according to their emotional reactions
Social Skill	The ability to find common ground and build rapport. Proficiency in managing relationships

Source: Emotional Intelligence, Daniel Goleman, Bantam, 1995

In turn, these five components require proficiency in areas such as active listening, questioning and influencing.

Finally, it is considered important for the mentor to be mindful of issues surrounding conflicts of interest and confidentiality.

Beliefs, Skills and Knowledge Required by the Mentee

Although a variety of beliefs, skills and knowledge are desirable, the core pre-requisites for a mentee are a willingness to take part, to be open and to trust.

Benefits of Mentoring

Viewed purely from a work/professional development perspective, mentoring has the potential to increase a mentee's knowledge of fundraising and improve the competence and quality of their day to day work. For mentors, it can improve the softer skills required for successful management and leadership. Research shows that such outcomes lead to broader organisational benefits:

Improved Leadership and Management Skills

- 71% of companies (from a poll of 378) stated that offering mentoring programmes to their employees had led to improved leadership and management skills

Source: Retention and Staffing Report, Manchester INC/Modis Professional Services, March 1999

Retention

- 77% of companies report that mentoring programmes are effective in increasing retention

Source: US Center for Creative Leadership

Increased Job Satisfaction

- Individuals who have a mentor often report greater job satisfaction

Source: Riley and Wrench 1985

Viewed more holistically, mentoring can offer broader benefits. For example, participants can gain an understanding of what makes them 'tick' and what makes relationships work. A greater understanding of their needs and values and of the importance of others, can change the way they feel about themselves and the wider community. Increased confidence, more aligned aspirations and a greater willingness to help others are some of the possible changes that can result from mentoring. This in turn can lead to genuine changes in behaviour.

The Evaluation Methodology

Feedback relating to the success of and need for mentoring was obtained from mentors, mentees and selected employers at the end of the pilot (March 2011). Feedback was primarily obtained via evaluation forms, with separate forms being produced for mentees, mentors and employers. All the forms used during the pilot can be obtained from *mch* upon request. The forms were sent to participants and selected employers by email and respondents were asked to complete and return the forms (either by email or post) within 10 days. One to two days before the deadline, an email reminder was sent to the 50% of respondents that had yet to return their forms. One to two days after the deadline, a text message reminder was sent to the 15% of respondents that had still not returned their forms.

In the end, the following returns were achieved:

- 75% of employer forms – six from a possible eight
- 100% of mentee forms – thirteen from a possible thirteen
- 100% of mentor forms – thirteen from a possible thirteen

Although the pilot had started with fourteen mentoring pairs, one pair brought their relationship to a premature close in December 2010. Consequently, formal feedback was not obtained from this mentoring pair, as the vast majority of questions would not have been applicable. However, qualitative feedback was obtained from this mentoring pair at the close of their relationship.

In terms of employer feedback, the employers of mentors were not contacted as the possible sample size was deemed too small to draw meaningful conclusions. This was because five of the thirteen mentors were freelance consultants and so did not have employers. Of the remaining eight mentors, four came from two employers, meaning a maximum sample of only six employers.

For the employers of mentees, feedback was only requested from the employers of mentees that had stayed with their employer for the duration (or almost the duration) of the pilot. This was because it was considered important to gain a perspective based on the whole of the pilot. Since five of the thirteen mentees changed jobs during the pilot, only eight employers were approached.

In addition to the final questionnaires, it was initially envisaged that each participant would be phoned six to nine months into the pilot in order to gain qualitative feedback as to how their mentoring was progressing. However, during the opening, matching and mentor training sessions, numerous participants expressed a desire to meet up with their peers during the course of the pilot. Consequently, two mentor gatherings (one in July 2010 and the other in February 2011) and one mentee gathering (in October 2010) were arranged. As a result, the feedback that would have been obtained from phone calls was obtained at these gatherings. Eight and nine mentors attended the July and February gatherings respectively, while ten mentees attended their

gathering. Those that could not attend were invited to contact *mch* if they had any issues that they wanted to discuss, however no contacts were received.

Scheduling two mentor gatherings reflected the importance IoFSW placed on supporting the mentors. This in turn was based on *mch*'s experience that providing support helps keep mentors motivated, and motivated mentors are crucial to a mentoring programme's success. The July gathering was designed to ensure that any emerging issues could be shared and addressed at an early stage, while the February gathering aimed to assist with any issues relating to bringing mentoring relationships to an end.

Finally, certain questions in the mentee/mentor application forms contributed to analysing the success of the pilot and some IoFSW research conducted in 2009 was used in relation to analysing the demand for the programme.

In addition to their overarching views, participant feedback for each key stage of the mentoring process was obtained through paper questionnaires completed after the opening, matching and mentor training sessions. An additional questionnaire was sent to all participants by email six to eight weeks into the pilot. This was designed to obtain early reflections of the pilot and their initial views on how their mentoring relationship was developing.

Questionnaire completion rates were:

- 100% of opening session attendees. This equates to 26 participants as one mentee and one mentor were unable to attend due to illness and a family emergency respectively
- 100% of matching session attendees equating to all 28 participants
- 85% of mentor training session attendees. This equates to 11 of the 13 mentees that attended. One mentor could not attend due to a work commitment and two mentors that did attend had to leave before they could complete the evaluation. Despite emailing feedback forms to these two participants, they were not returned.
- 90% of participants (25 out of 28) responded to the questionnaire sent by email six to eight weeks into the pilot.

The Evaluation Figures and Statistical Significance

In order to determine statistically significant sample sizes, *mch* used the methodology outlined in Appendix one.

Comparing various statistically significant sample sizes with actual sample numbers shows that a relatively high degree of confidence can be assigned to all areas of feedback, with the exception of employer feedback.

Type of Feedback	Participant Data		# Respondents Required for:					
	Total Relevant Number	Number Actually Obtained	90% (+/-10%)	90% (+/-5%)	95% (+/-10%)	95% (+/-5%)	99% (+/-10%)	99% (+/-5%)
Final Feedback - Mentors	13	13	10.9	12.4	11.5	12.6	12.1	12.7
Final Feedback – Mentees	13	13	10.9	12.4	11.5	12.6	12.1	12.7
Final Feedback – Employers	8	6	7.2	7.8	7.4	7.8	7.6	7.9
Opening Session Feedback	26	26	18.8	23.7	20.5	24.4	22.5	25
Matching Session Feedback	28	28	19.8	25.4	21.7	26.1	23.9	26.9
Mentor Training Feedback	13	11	10.9	12.4	11.5	12.6	12.1	12.7
Early Feedback from All Participants	28	25	19.8	25.4	21.7	26.1	23.9	26.9

Assessing the Demand and Need for the Programme

Demand

The demand for a mentoring programme was evident at two key periods in time. A clear demand was first shown from IoFSW's 2009 Regional Survey, in which 77% of respondents answered 'Yes' to the following question;

'The South West Group is planning to develop a 'Mentoring Scheme' - would you be interested in becoming involved as a Mentor or in receiving mentoring support from an experienced fundraiser?'

The survey was sent to approximately 550 individuals and 88 responses were obtained. Such a return gives a 95% confidence level (+/- 10%) that a 77% interest level in participating in mentoring existed across the cohort.

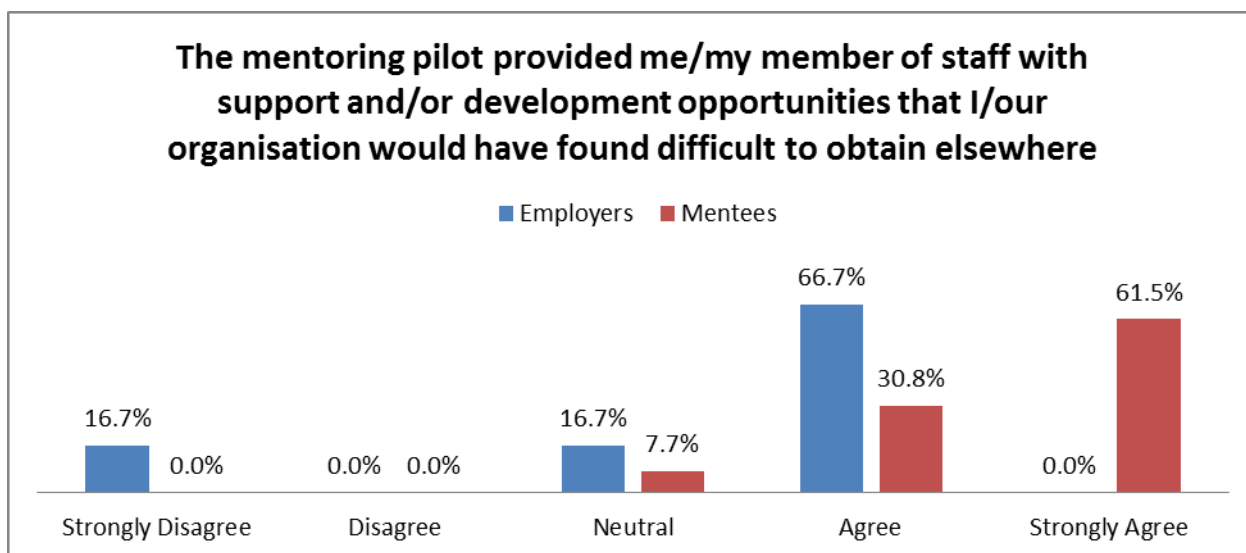
mch feels it is worth highlighting the importance of such early market research/feasibility analysis. In *mch*'s view, such analysis is a crucial precursor to any proposed pilot as it gives an organisation confidence to invest the required amount of time and money. In *mch*'s experience, such analysis is often overlooked and organisations go straight to pilot design phase. Such a decision runs the risk of disappointing participant numbers.

The second time period in which demand was evident was during the application process with 19 mentee applications being received for 14 places. Furthermore, the fact that IoFSW reached its target of 14 mentors suggests there was a demand amongst experienced fundraisers to act as mentors.

Need

Need was assessed by explicitly asking mentees, mentors and employers whether the pilot provided;

"support and/or development opportunities that would have been difficult to obtain elsewhere".



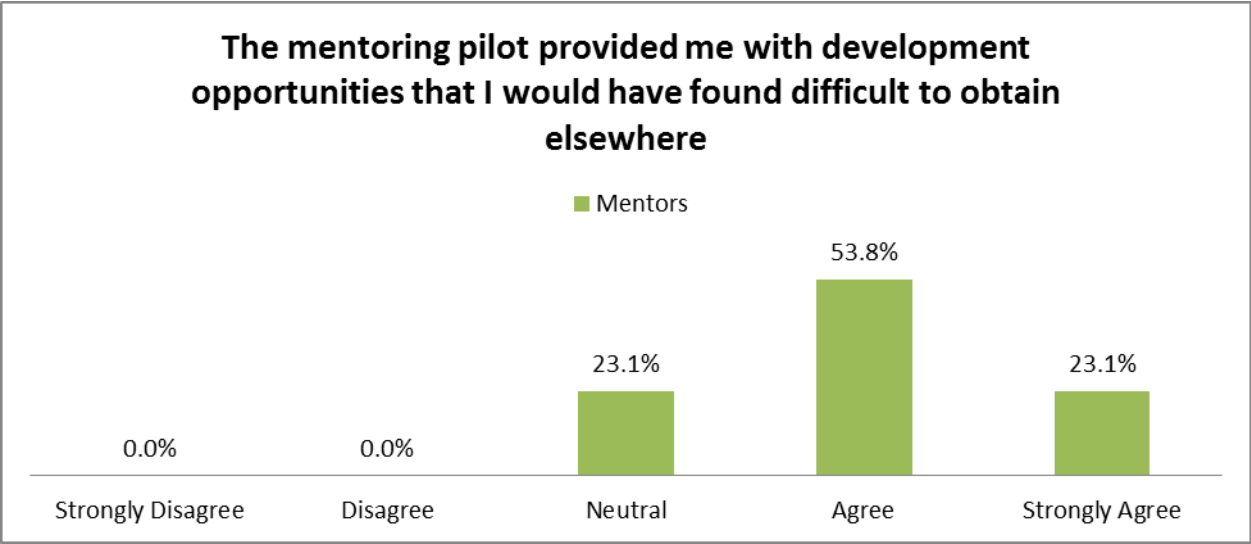
The fact that all but one of the mentees either agreed or strongly agreed with this statement, suggests a strong need for mentoring amongst fundraisers in the South West of England.

Although two thirds of employers agreed with the above statement, a neutral and strongly disagree were also recorded. It is important to remember that the employer responses are not statistically significant; however it could be speculated that such a result is not surprising, given that the employers did not have the benefit of their mentees' 'first hand' experience of mentoring. Alternatively, it could suggest that more needs to be done in communicating the impact of mentoring to employers.

In addition to the above cumulative data, individual stories also highlight the depth of need in certain cases. For example, when mentees were asked at the end of the pilot to state what the greatest benefit of mentoring had been, one participant responded;

“Having someone to go to for support and advice – I have had no fundraising manager for two years.”

Given that supporting and developing the mentee was the focus of mentoring, the above analysis is considered the most important with respect to need. However, in *mch*'s experience, the mentor often derives considerable development benefits from the relationship. Mentor responses from the pilot were in keeping with this experience. The fact that over three quarters of mentors stated that they would struggle to obtain such development opportunities from elsewhere strengthens the need for mentoring further.



Analysing the Success of the Programme

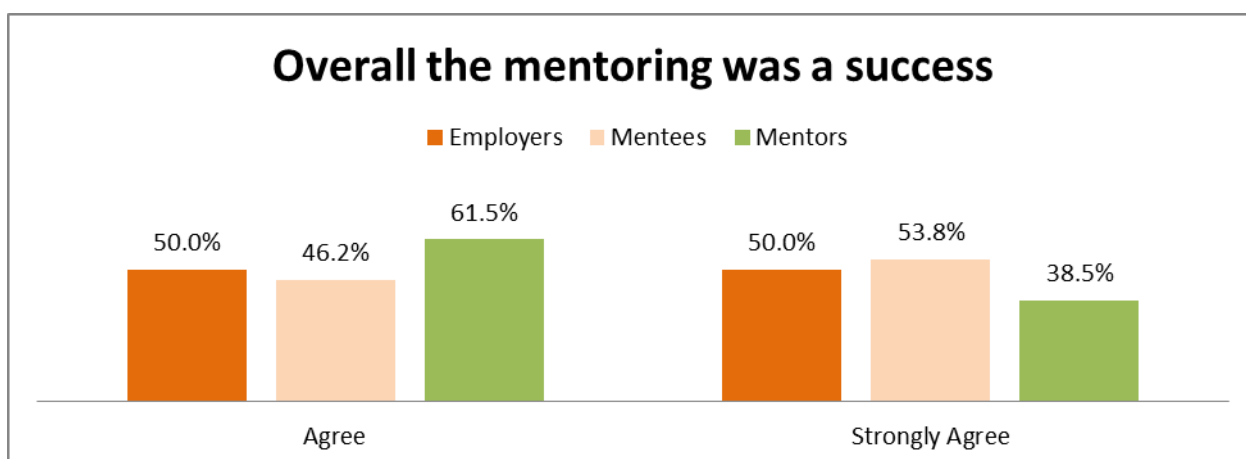
Overarching Success Involving All Participants

Six proxies were used in relation to examining the overarching success of the pilot. The first four centred on employer and participant responses to the following statements:

1. Overall the mentoring conducted was successful
2. I would recommend the IoFSW mentoring programme to other fundraisers/organisations
3. The mentoring pilot has been a worthwhile use of my time
4. I have enjoyed participating in the pilot

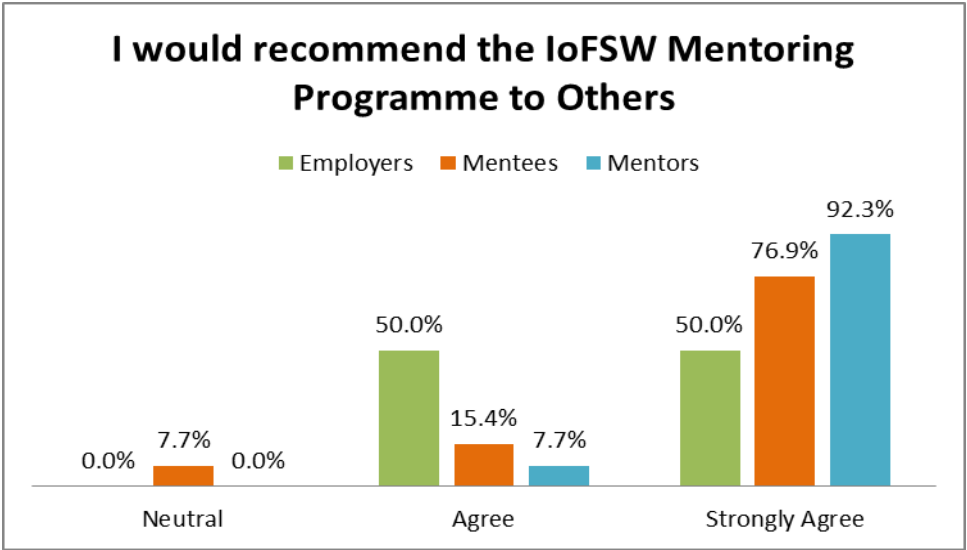
The fifth proxy was simply the number of mentoring relationships that did not end prematurely. The sixth proxy was the number of relationships that planned to continue after the pilot's official end point.

All mentees, mentors and relevant employers felt that the mentoring had been a success overall. In line with previous mentoring programmes, mentors were slightly less sure about strongly agreeing with such a statement.

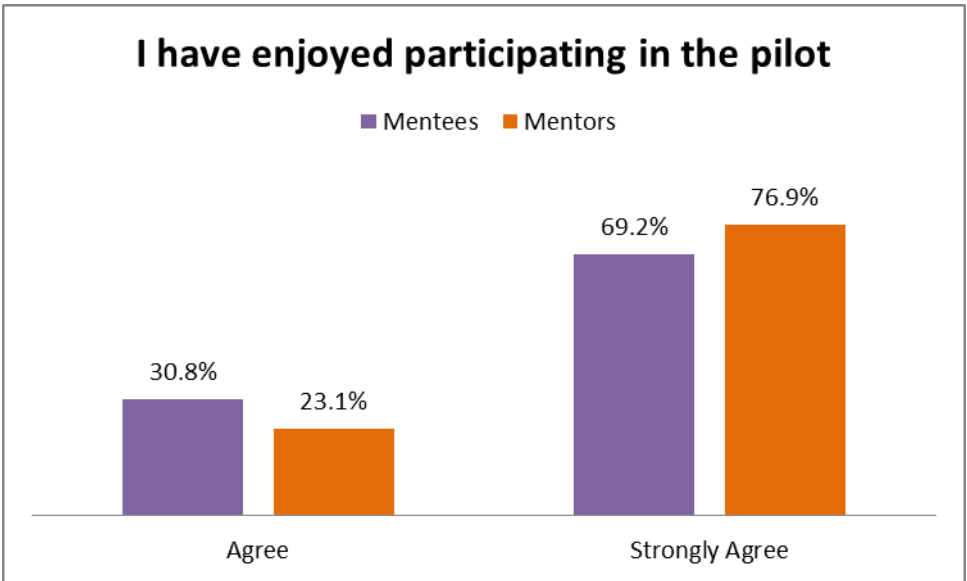
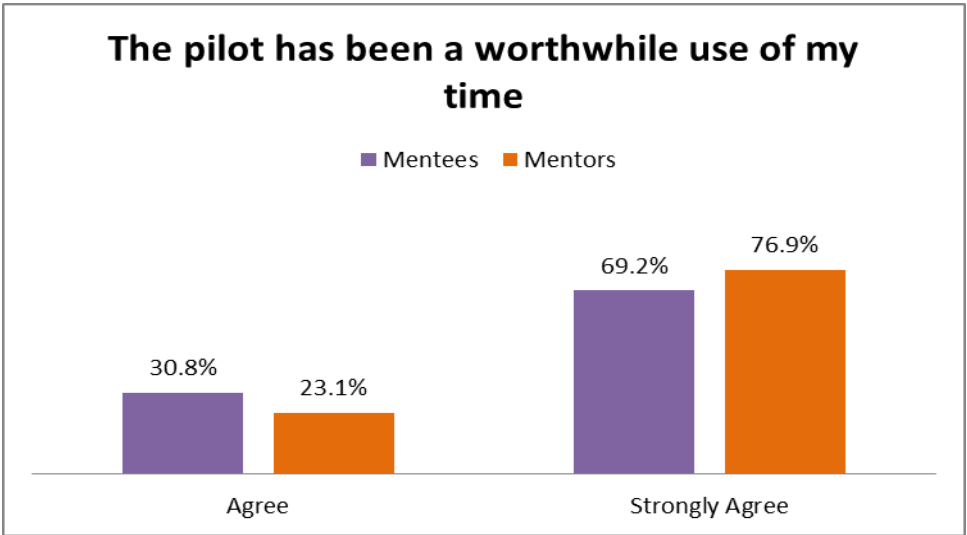


In *mch*'s view this is likely to be due to the self-deprecating nature of many mentors and the fact that mentors often do not realise the full extent of their impact and the power of just 'being there' for their mentees.

Despite potentially underestimating their impact, mentors were more likely to recommend mentoring to other fundraisers:



They also found the pilot more worthwhile and seemed to enjoy it slightly more than mentees:



Again, this fits with *mch*'s experience from other mentoring programmes and adds credence to the belief that although mentoring needs to focus on the mentee to be successful, doing so leads to the mentor gaining just as much as the mentee.

In terms of the fifth proxy of success:

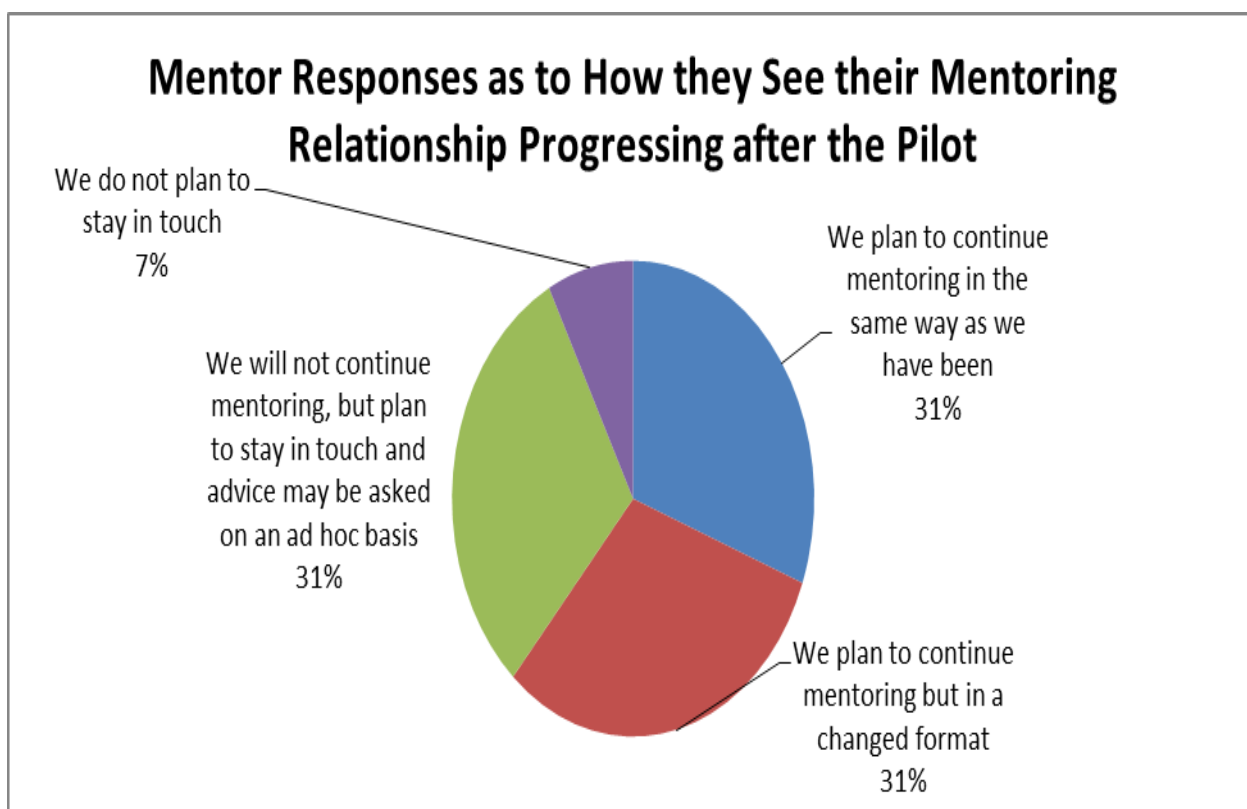
- 13 of the 14 mentoring relationships did not end prematurely

An inability to schedule sufficiently regular face to face meetings was the main reason for the 14th relationship ending after eight months. This appeared to be due to a combination of personal commitments and geography (the mentor and mentee were three hours drive from one another). This relationship was deemed to have ended prematurely because it ended with the mentee feeling they still needed support.

A second relationship ended before the end of the 12 month trial because the mentee decided to leave their fundraising job and train for a completely new career. However, this relationship was not deemed to have ended prematurely, because the mentor had helped the mentee to make some key decisions and once those decisions had been made, it would appear that the mentee no longer felt the need for a mentoring relationship.

In terms of the sixth proxy:

- 60% (eight mentoring pairs) of the 13 mentoring pairs that did not end prematurely plan to continue mentoring and only 7% (one mentoring pair) do not plan to stay in touch:



Ideally, one would expect there to be complete alignment between the mentee and mentor responses with respect to how they saw their relationship progressing beyond the pilot. Of the thirteen mentoring pairs ten were aligned. Of the three that were not, the following table summarises the responses:

Unaligned Pair	Mentor's Response	Mentee's Response
1	We will not continue mentoring, but plan to stay in touch and advice may be asked on an <i>ad hoc</i> basis	We plan to stay in touch, although it's unlikely advice will be sought in the future
2	We will not continue mentoring, but plan to stay in touch and advice may be asked on an <i>ad hoc</i> basis	We plan to stay in touch, although it's unlikely advice will be sought in the future
3	We do not plan to stay in touch	We have not discussed/decided what form our relationship will take after the pilot

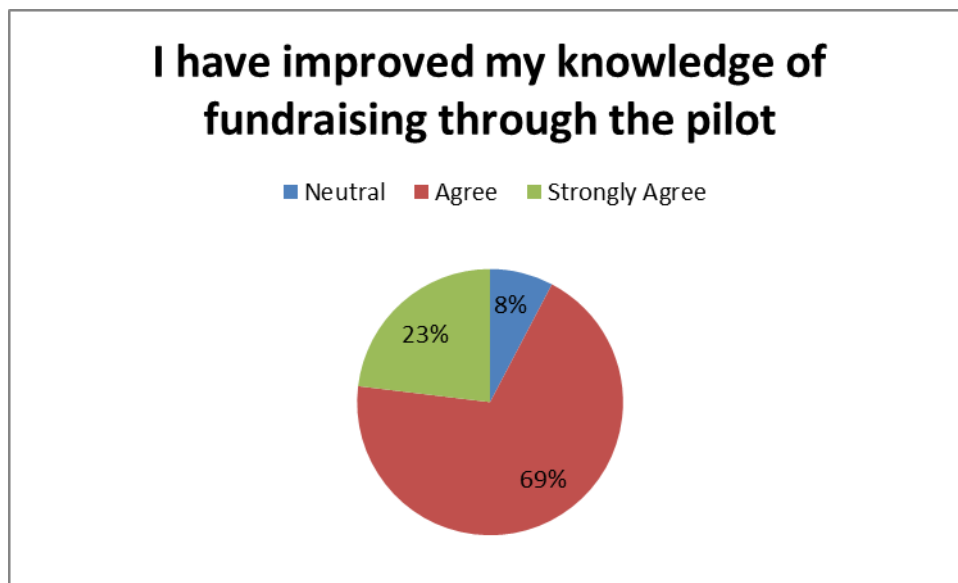
Unaligned pairs one and two did not cause *mch* grounds for concern as the mentors were essentially happy to provide more than the mentees expected. Unaligned pair three was more concerning as it appeared that the mentor believed a decision had been made, while the mentee did not. Consequently, the mentee in question was contacted and fortunately, despite the above discrepancy, a very amicable open ended agreement had been reached by the mentor pair three.

Detailed Analysis of Success from the Mentees' Perspective

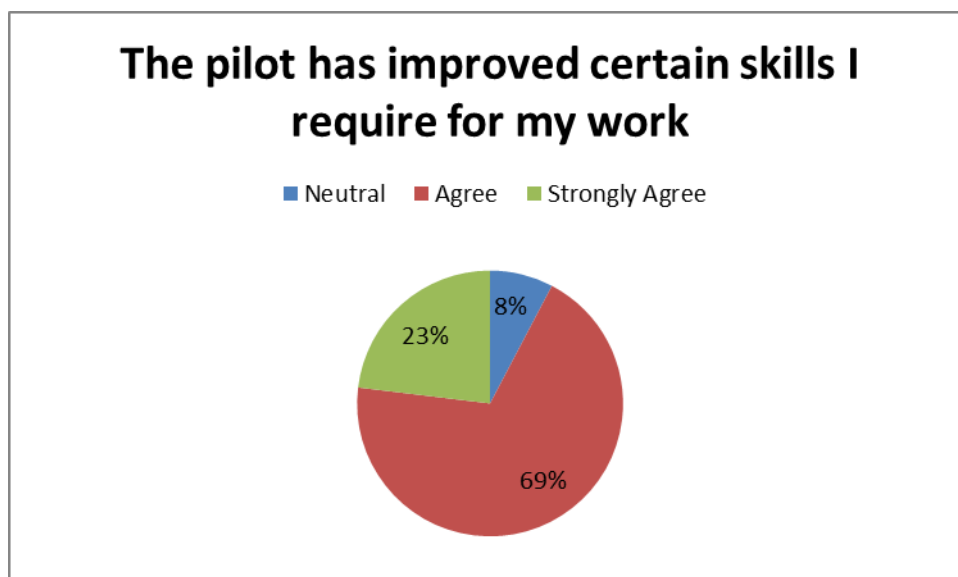
Insights Obtained from the Mentees

At all stages of the pilot it was made clear that the scope of mentoring was the *life* of the mentee. Consequently, the evaluation tried to examine the impact of mentoring beyond just fundraising by considering the impact on general work issues and life outside work. While there is often considerable overlap between these three areas, questions were asked to try and gauge the impact in each one.

All but one mentee agreed or strongly agreed that their knowledge of fundraising had improved through the pilot:



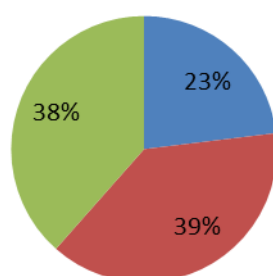
In addition to knowledge, intrinsic skills are also crucial to fundraising and general success at work. As with knowledge, the pilot had the same level of impact:



Knowledge and skill are not enough however, you have to have confidence in your knowledge and skills. Again the results show that mentoring was successful or very successful in three quarters of cases:

My mentor has helped improve my confidence

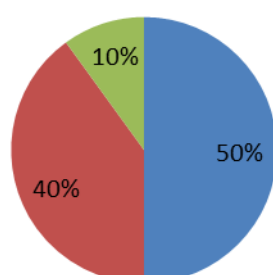
■ Neutral ■ Agree ■ Strongly Agree



With improved knowledge, skills and confidence, the net effect is often that you enjoy your job more. In a half of relevant cases, mentees felt that the mentoring process had increased their enjoyment of their job:

The pilot has increased my enjoyment of my job

■ Neutral ■ Agree ■ Strongly Agree



It should be stressed that the above results refer to the global average of mentee responses and are therefore likely to underplay the impact of mentoring. For example, the question;

'My mentor has helped improve my confidence'

is really only valid if the mentee felt they were lacking confidence in the first place. If the mentee felt confident at the beginning of the pilot, then answering 'Strongly Disagree', 'Disagree' or 'Neutral' would have been perfectly valid, but this would not diminish the case for mentoring. It would simply mean that confidence was not an issue that was likely to feature as a development issue in that particular relationship. However, the fact that no 'Strongly Disagrees' or 'Disagrees' featured in the responses, suggests that the need to develop knowledge, skills and confidence applied to most mentees. Furthermore, when mentees were asked about what they had liked about the pilot, or about the benefits of having a mentor and what mentoring had achieved, around half explicitly mentioned the positive impact it had had on their confidence.

Another way in which skills, behaviours and feelings were examined was by asking participants to answer a series of statements at the beginning and end of the pilot.

For each of the statements participants chose from a 1-7 scale. Circling '1' implied that they considered themselves to be highly competent in relation to the specific skill, behaviour or feeling. Circling '7' implied a self-perception of being very poorly skilled.

The averaged results for mentees are shown below:

Skill/Feeling/Behaviour	Start of Pilot		End of Pilot		Improvement /Regression in Average
	Average Score	Standard Deviation	Average Score	Standard Deviation	
I am confident in my role as a fundraiser	3.5	0.8	2.3	0.8	1.2
I am confident in taking charge of my career development	3.2	1.1	1.9	0.9	1.3
I feel supported in my work	4.4	1.3	3.3	1.1	1.1
I feel supported in my life outside of work	1.9	0.8	2.3	0.8	-0.5
I am happy with the way I view myself	2.5	1.2	2.1	1.1	0.4
I am happy with the way people at work view me	2.7	1.0	2.4	1.0	0.3
The way people view me is accurate	3.3	1.0	2.6	0.9	0.7
I like to be challenged	1.9	0.7	2.0	0.7	-0.1
I am motivated to develop as a person	1.7	0.6	1.8	0.6	-0.1
I am open. I share who I am and how I feel with others	2.6	1.4	2.5	1.2	0.2
I am reliable. I promise what I do and do what I promise	1.9	0.6	1.8	0.9	0.2
I am able to recognise and understand my moods as well as their effect on others	2.6	1.1	2.2	1.0	0.4
I am able to control disruptive emotions. I am able to think before acting	2.5	0.8	2.6	0.8	-0.1
I am good at understanding the emotional make-up of other people.	2.6	0.6	2.5	0.7	0.2
I am effective at treating people as they are, not as I would like them to be	2.6	0.6	2.2	0.8	0.4
I am able to find common ground with other people	2.5	0.5	2.4	0.9	0.1
I enjoy my work	2.1	0.7	2.3	0.9	-0.2
I feel capable of doing the work that is expected of me	3.1	1.0	2.1	1.0	1.0
I work well with others	2.1	0.6	1.9	0.6	0.1

Before reviewing the results a number of precautionary notes are advisable. Firstly, the results are based on self-assessments and while research has shown that self-reporting of strengths and weakness can be accurate¹, accuracy is generally improved when people who know the participant well, also rate them. Secondly, the results are based on only two snap shots in time and thus how the person was feeling on the day they answered the statements could have a significant bearing on their responses. Finally, over the 12 months of the pilot, the mentee's participation in mentoring is likely to be one of many 'interventions' that could have influenced their scores.

1. For an example see: Longitudinal study of self-assessment accuracy' Fitzgerald JT, White CB, Gruppen LD; Med Educ. 2003 Jul37(7):587-8

Bearing these notes of caution in mind, the average scores at the start of the pilot offer some interesting observations as to the development issues common to most mentees. In view of the fact that a seven point scale was used, *mch* considers that any average above three, suggests that a significant number of mentees need real support in this area. Such averages are shown in blue and refer to the following statements:

Skill/Feeling/Behaviour	Average Score
I am confident in my role as a fundraiser	3.5
I am confident in taking charge of my career development	3.2
I feel supported in my work	4.4
The way people view me is accurate	3.3
I feel capable of doing the work that is expected of me	3.1

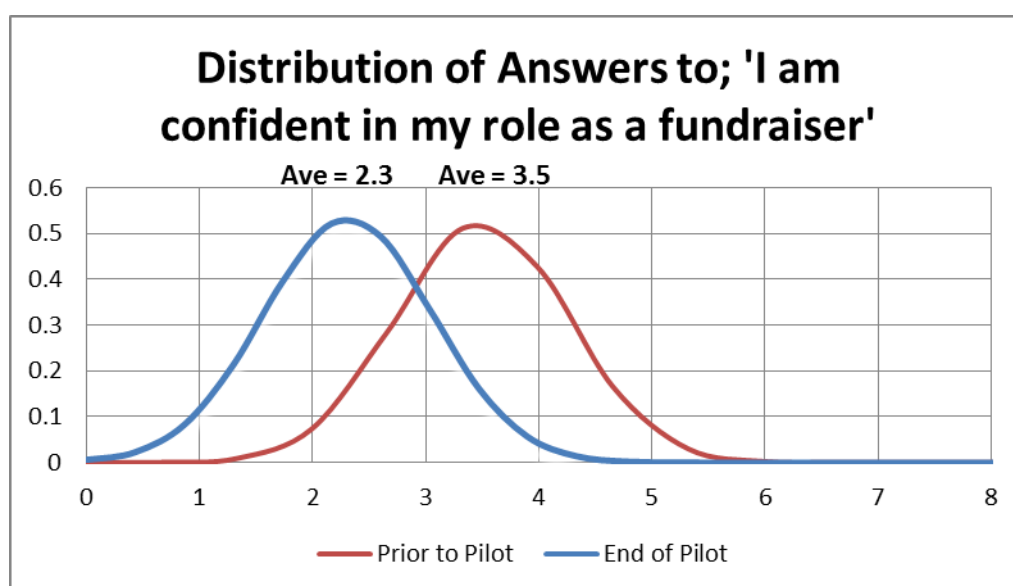
These statements reinforce the belief that for a significant number of mentees, a lack of confidence and support was a real issue.

It is also important to consider the standard deviations in association with the averages. Essentially, the standard deviation indicates the variance in responses to each statement. The smaller the standard deviation the smaller the variance. Put another way, a small standard deviation means that mentees provided similar scores.

In *mch*'s view, all the standard deviations are relatively large which signifies that there is no skill, behaviour or feeling in which many mentees share similar scores. This is to be expected, as the mentees were from very different backgrounds and were at differing stages of their careers.

As a very rough rule of thumb though, *mch* considers that if the change in average score (between the start and end of the pilot) is greater than the standard deviation of either average, then such a progression or regression is significant. Interestingly, this only occurs in four instances and all four relate to the above statements concerning confidence and support. *mch* considers this to be very heartening as it indicates that mentoring may have had the greatest impact in the areas of greatest need.

This can be illustrated graphically for the statement relating to mentee confidence in being a fundraiser:

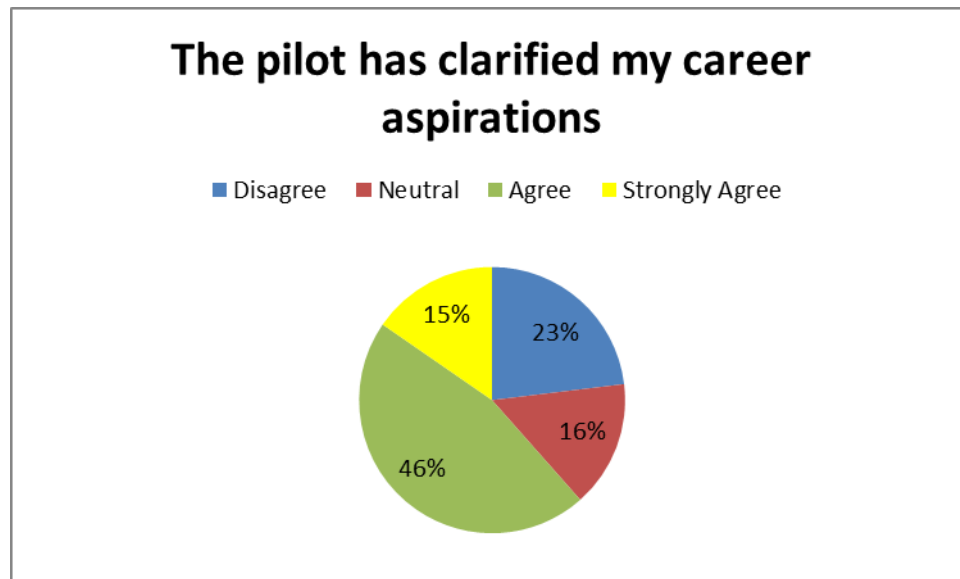


Out of the nineteen statements, fourteen showed a progression, while five showed a regression. Except for the statements that have already been discussed, *mch* considers that the changes observed (whether good or bad) are not significant enough to merit comment.

Many of the above skills, behaviours and feelings are applicable to fundraising and general work. A statement that focused on work more generally was:

'The pilot has clarified my career aspirations'

The results show that for over 60% of mentees, the pilot was beneficial in this regard:



In certain cases, the pilot had a profound impact on career aspirations:

"This has opened doors to training in Emotional Intelligence and NLP; and the discovery of a passion for coaching, leadership and developing effective teams within organisations."

"My mentor has supported me in applying for new jobs and preparing for interviews – again, encouraging my confidence."

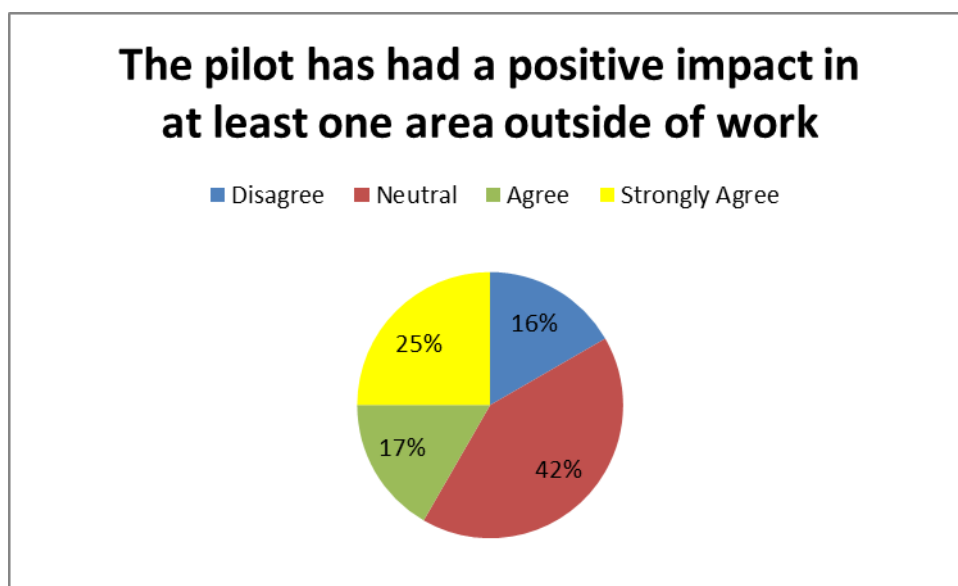
"I was able to honestly tell my mentor that I wanted to walk away and start a whole new career, and that she was able to support me even though it had nothing to do with fundraising is a great achievement! My mentor even gave me advice on working in a family business (which my new venture slightly involves) from her own experience. I could tell that my mentor was genuinely happy for me and excited about my new venture and we now stay in contact purely because she is interested in me and how I'm getting on. I value the ideas and suggestions she has given my new venture, even though they are not her designated field of expertise."

A common characteristic of good mentoring is that it prompts participants, particularly mentees to reflect and consider issues beyond the 'day to day'. The above result suggests that the pilot was effective in prompting reflection on the broader issue of career progression. The level of reflection can be broader still as indicated by the following mentee responses to their mentoring relationship's greatest achievements;

"Helping me to understand who I am..."

"I learnt more about my thought processes and how I communicate ideas to others."

In terms of mentoring's impact on the lives of mentees outside of work, a third of mentees agreed or strongly agreed that it had had a positive impact in at least one area:



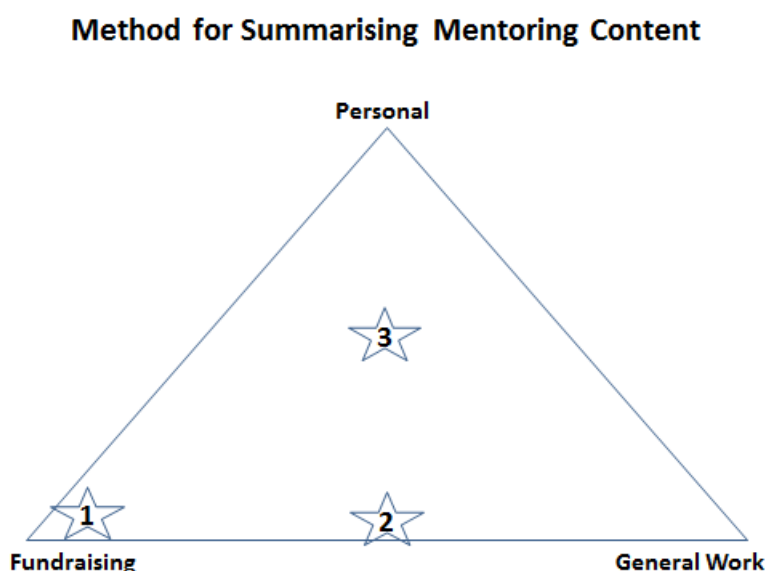
The types of issues mentioned ranged from the general;

"It's improved my confidence in my ability to meet new challenges"

To the specific;

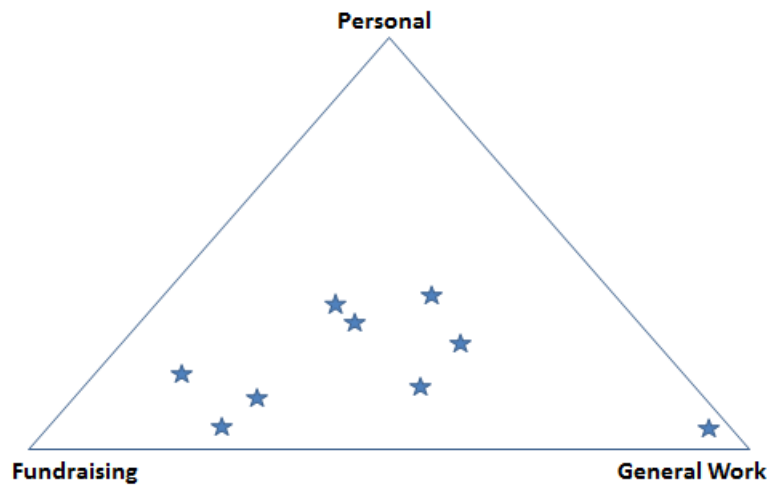
"My mentor helped me integrate my voluntary work into my freelance work. As a result, I have been able to embrace my passion for [a sporting interest] as a fully complimentary source of inspiration for my business direction. I have also been able to introduce mentoring into the [sporting] club as a concept to develop both athletes and committee members in their respective performance/leadership roles."

While mentoring had a real impact on general work and personal issues for some mentees, a significant number did not report such an impact. Based on the information obtained from the mentor and mentee gatherings, this would appear to be because the focus of many sessions was primarily fundraising. This point was illustrated when attendees placed a star in a triangle to summarise how they were spending their time between fundraising, general work and personal issues. To illustrate, a star placed in position one would signify that mentoring sessions were spent exclusively on fundraising issues, while a star placed in position two would signify that time was split evenly between fundraising and general work issues. Alternatively, a star placed in position three would signify that time was spent relatively evenly between fundraising, general work and personal issues.

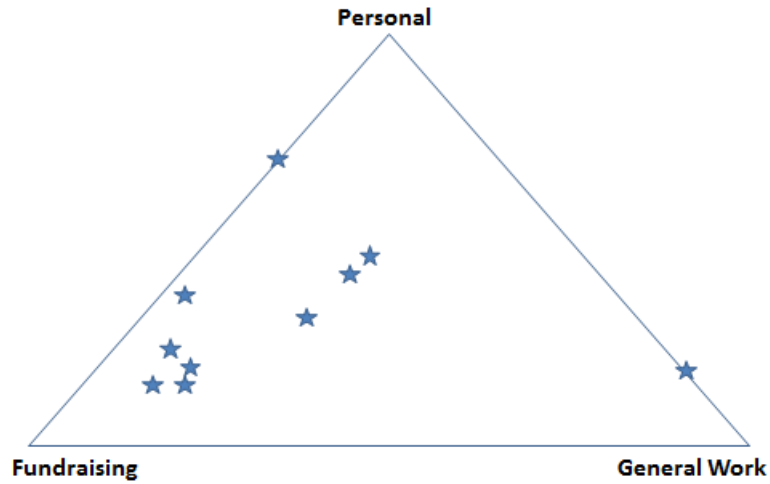


It should be stressed that this exercise was only conducted with 8-10 participants at each gathering. Consequently, the findings do not necessarily relate to the whole cohort.

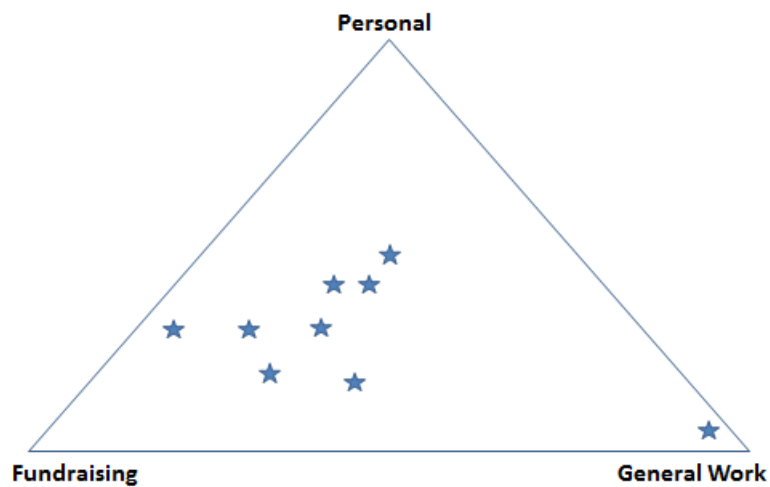
Mentor Summaries of Mentoring Content – 3 Months into the Pilot



Mentee Summaries of Mentoring Content – 7 Months into the Pilot



Mentor Summaries of Mentoring Content – 9 Months into the Pilot

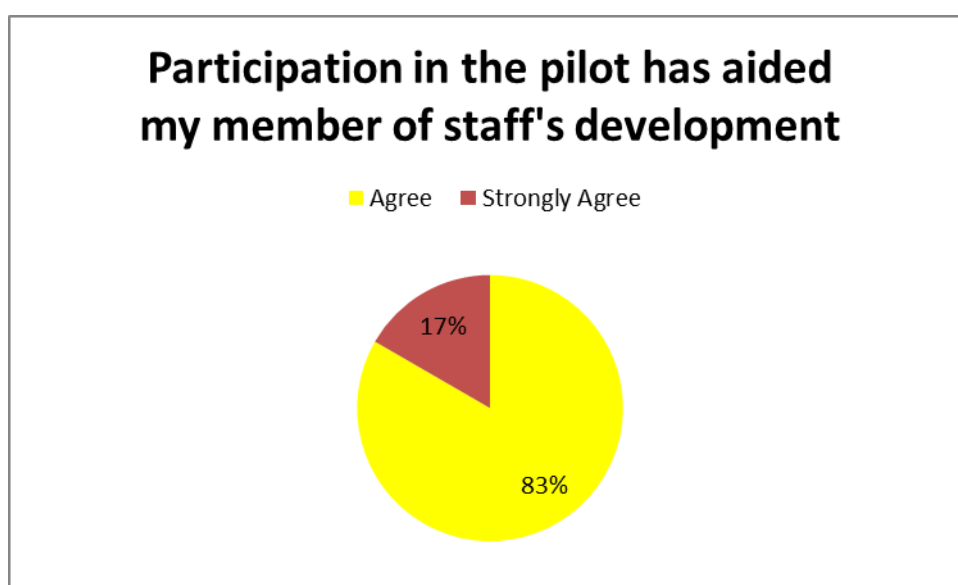


With one or two exceptions, the three diagrams appear to show that, while fundraising, general work and personal issues were all discussed, there was a definite leaning towards fundraising issues at all stages of the pilot.

Given that six mentors completed both mentor diagrams there would appear to be a slight move towards personal issues as the pilot progressed. In *mch*'s view, this is not unexpected: as trust develops, mentees are more likely to feel comfortable enough to talk about more personal issues.

Mentee Development from their Employer's Perspective

The positive impact of the pilot on mentee development was strengthened by the views of their employers, as 100% of those asked stated that mentoring had aided their development;



Increased self-confidence was cited by several employers. Specific fundraising competences were also mentioned such as;

“an ability to set out a trust fundraising strategy”

“detailed information about specific trusts”

“understanding of elements of corporate fundraising”

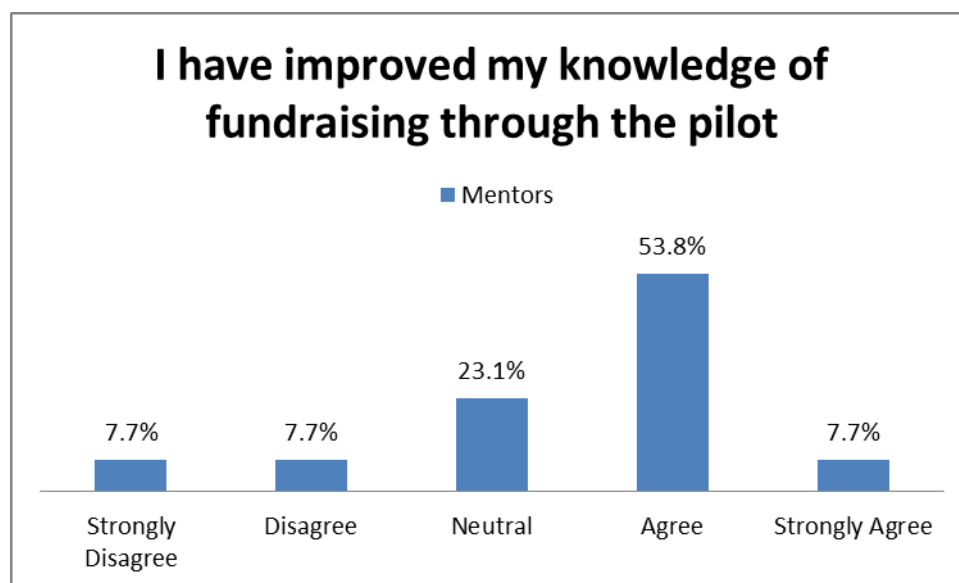
Detailed Analysis of Success from the Mentors' Perspective

As stated previously, the following messages were conveyed to all applicants and participants:

- (i) The mentee should be the focus of each mentoring relationship
- (ii) The special nature of a mentoring relationship stems from the fact that the mentor gives of themselves, with no expectation of anything in return

Consequently, much of the evaluation work focussed on mentee progression as a result of mentoring. However, in *mch*'s previous experience, mentors often gain just as much from mentoring as mentees. The potential benefits of mentoring to a mentor's fundraising skills, general work and life outside work were therefore examined briefly.

Despite all the mentors being experienced fundraisers, over 60% felt that mentoring had improved their fundraising knowledge:



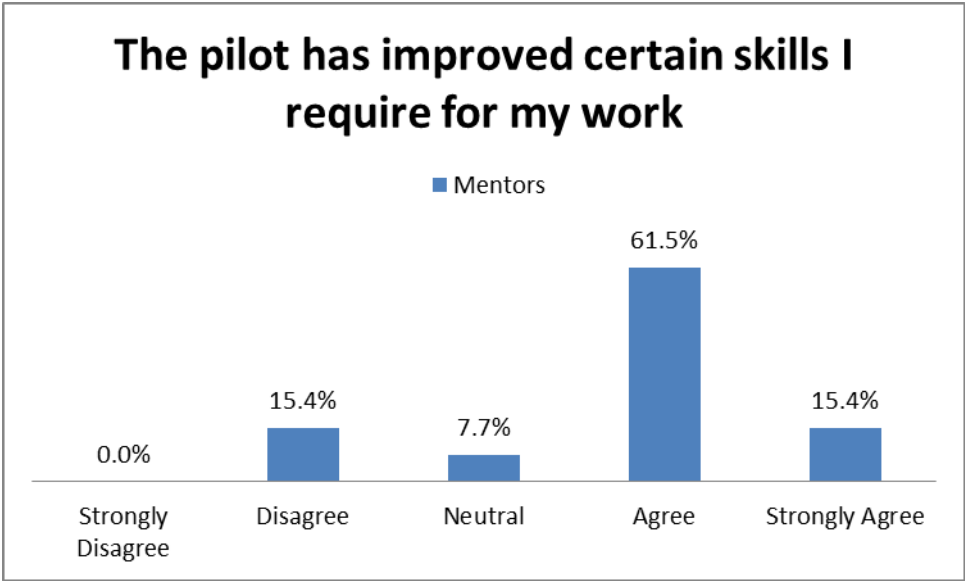
Based on mentor responses relating to how they had benefited from mentoring, one of the improvements to fundraising knowledge would appear to be a greater awareness of how other charities, particularly smaller ones, operate:

"It's helped me to understand more about the experiences of others particularly in smaller charities – and made me thankful for what I have. Even when resources are tight, I don't have to struggle with the issues other smaller organisations are facing."

"Better knowledge of the struggles fundraisers have."

"Being aware of the sector outside my own place of employment – keeping up to date through my 'youngster's' eyes!!"

Over 75% felt that mentoring had improved certain skills they require for work more generally:



Some of the specific skills developed and the nature of skill development emerged when mentors were asked how they had benefited from mentoring:

“Developing my listening/communication skills.”

“It's improved my management skills.”

“I have gained personally in terms of becoming better at listening and providing support and advice rather than simply giving direction.”

“I think the training and practice has helped refresh some skills I already had. I also think it is good to be tested and stretched and I feel this process has challenged me.”

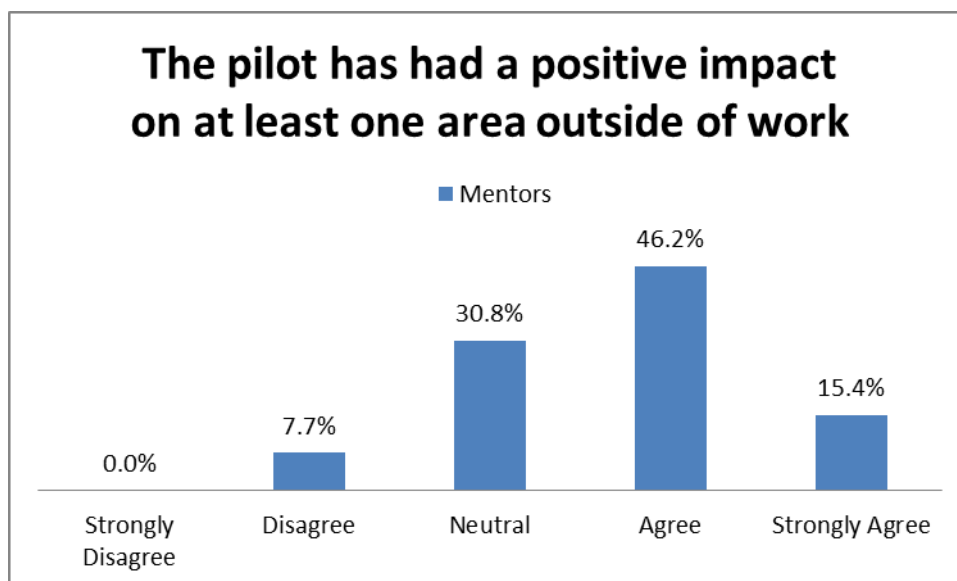
“It's made me reflect more on my own work & the best way to carry it out.”

“It made me focus & reevaluate some of the basics of my own work.”

Although not a skill, a significant benefit cited by one mentor was that mentoring had an energising influence:

“It was good to mentor someone young and enthusiastic which gave me energy at times when fundraising becomes challenging.”

A strong majority also felt that mentoring had had a positive impact in areas outside of work:



The benefits mentioned were varied, but several appeared to benefit from the reflective nature of mentoring, particularly in relation to whether mentors were actually 'practicing what they were preaching':

"The pilot has helped me to be a bit more fearless about making personal decisions about my future direction!"

"It's made me reflect on the need to improve my own work-life balance whilst advising my Mentee on hers and I have been trying to reduce my workload as a result."

Just like with mentees, mentors were asked to rate themselves relative to specific skills, behaviours and feelings at the beginning and end of the pilot. Again, a 1-7 scale was used and circling '1' implied that they considered themselves to be highly competent while circling '7' implied a self-perception of being very poorly skilled.

The averaged results for mentors are shown below:

Skill/Feeling/Behaviour	Start of Pilot		End of Pilot		Improvement/Regression in Average
	Average Score	Standard Deviation	Average Score	Standard Deviation	
I am motivated to develop as a person	1.4	0.6	2.2	0.9	-0.7
I am open. I share who I am and how I feel with others	2.2	0.6	2.7	1.0	-0.5
I am reliable. I promise what I do and do what I promise	1.7	0.5	2.1	0.8	-0.4
I am able to recognise and understand my moods as well as their effect on others	2.0	0.6	2.2	0.8	-0.2
I am able to control disruptive emotions. I am able to think before acting	2.1	0.7	2.4	0.7	-0.3
I am good at understanding the emotional make-up of other people.	2.2	0.7	2.5	0.8	-0.2
I am effective at treating people as they are, not as I would like them to be	2.1	0.5	2.5	0.9	-0.4
I am able to find common ground with other people	1.6	0.5	1.6	0.7	0.0
I am a good listener	1.8	0.7	2.2	0.8	-0.4
I give good feedback	1.9	0.7	2.8	1.0	-0.8
I can use questioning techniques to help someone else resolve an issue	2.1	0.6	2.5	0.8	-0.5

Before reviewing the results it is important to remind ourselves that the same notes of caution mentioned for the comparable mentee data are applicable here.

Bearing these notes of caution in mind, a number of interesting issues present themselves. Firstly, the average range of 1.4 – 2.2 for self assessments at the start of the pilot suggests a very skilled group of mentors. Furthermore, the standard deviations at the start of the pilot are all relatively small, meaning that there is not much variance between mentors.

Relative to the starting scores, all but one skill, behaviour or feeling shows a regression by the end of the pilot. Essentially, this means that collectively mentors did not rate their skills as highly at the end of the pilot as they did at the start. It should be noted though that the standard deviations are significantly higher for the end of pilot averages, meaning that the mentor self-assessments are not as similar compared to the start of the pilot. This suggests that the overarching regression in scoring did not apply to all mentors and further analysis showed that three of the thirteen mentors made an improvement in their overall scores.

As with the mentee analysis, it is important to consider the standard deviations in association with the averages. Using the very rough rule of thumb that significant regression exists if the change in average scores is greater than either of the relevant standard deviations leads to only two significant regressions:

- (i) I am motivated to develop as a person
- (ii) I give good feedback

In terms of the regression in motivation, the explanation could lie in the old adage that, 'it's all relative'. Mentors may well have considered themselves very motivated at the beginning of the pilot, but their final scores could have been influenced by comparisons between their levels of motivation and those of their mentees. The fact that all mentees seemed highly motivated and many were at a much earlier stage in their career and life (relative to their mentor) could explain the less favourable mentor self-assessments.

From *mch*'s perspective, the regression for feedback was not surprising given how testing mentoring can be in this respect. The demands can stem from:

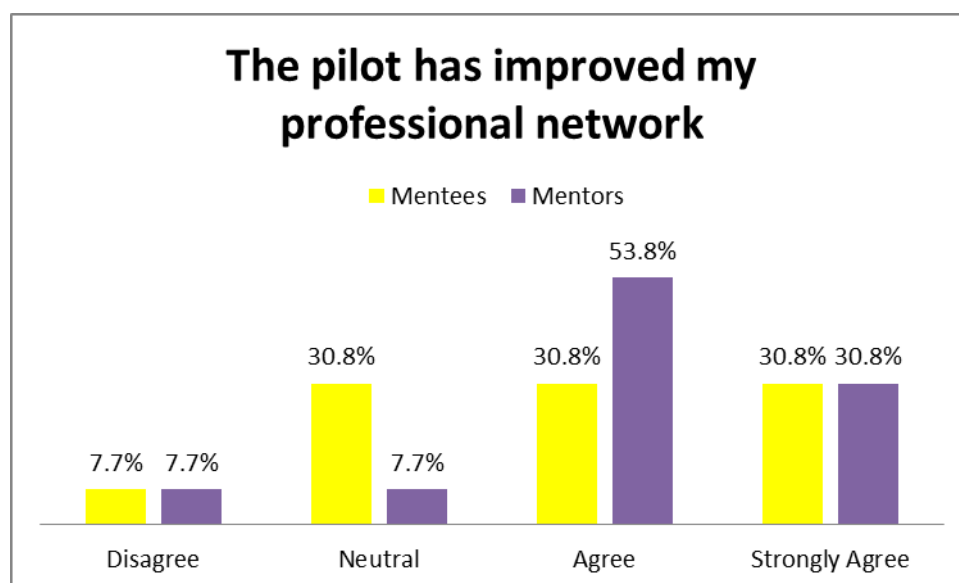
- (i) The range of issues
 - Feedback can be given in so many areas from work specific through to personal issues.
- (ii) The importance of issues
 - It is not uncommon for mentoring relationships to discuss very significant issues e.g. Should I change jobs and move to a different part of the country?
- (iii) The sensitivity of issues
 - It is not uncommon for a mentee to disclose highly personal issues to their mentors. Any comments in relation to such issues require high sensitivity

Given these demands, it is perhaps not surprising that mentors did not feel as strong in this area at the end of the pilot as at the beginning.

For future evaluations it could be insightful to gain the mentees' perspectives on how the skills of their mentors vary over the course of 12 months. *mch* would postulate that mentees are likely to state that mentor skills in areas like feedback improve during the course of the 12 month mentoring period. This would then suggest that many of the regressions recorded do not actually mean skills/behaviours/traits lapsed, but simply that initial self-assessments were a little too optimistic.

Unexpected Benefits of Mentoring for Both Mentees and Mentors

Although the focus of the mentoring programme was on the development of successful one to one relationships, an unexpected success was the pilot's networking and broader relationship building benefits. When quantified, nearly two thirds of mentees and over 80% of mentors either agreed or strongly agreed that the pilot had increased their professional network.



In some cases such networking led to profound insights and subsequent actions:

"Working with my mentor and generally meeting the other mentors, mentees and pilot organisers gave me a glimpse into what fundraising should and can be. Having felt unhappy with my organisation for some time, I had started to feel my inadequacies as a fundraiser were to blame for some of the difficulties within the organisation. The pilot has taught me that, sadly, it was the organisation I was with that was lacking in expertise.....I realised I had to leave the organisation. Whilst this was a difficult and emotional decision I now have a clearer idea of what good fundraising can achieve and how I can achieve it."

For others, meeting a range of new peers had both tangible and intangible benefits:

"I feel that meeting a host of other fundraisers at the training days were an integral part of the experience, and I hadn't even considered the value of them before we began the pilot. As well as valuable advice from my mentor I have shared lots of ideas and experiences with other mentees and there is something to be said for knowing that someone else is in the same boat as you – it is very easy to feel isolated if you are new to fundraising or in an organisation that hasn't quite got to a good fundraising standard/level. Whilst there were a few mentors I didn't want to work with on a one-to-one basis I really do feel that just speaking with them for the 20 minute 'speed-dating' sections on the training day gave me lots to think about and really broadened my horizons."

"[A benefit] is the sense of connection I have with the IOFSW, the other mentees and mentors and the feeling that I have a network in fundraising which is absolutely genuine and authentic."

Many mentors also expressed the value of developing networks/relationships when asked about their likes/benefits of the pilot. Such relationships encompassed both the professional and personal:

"I really valued the peer relationships with my fellow mentors & the chance to get to know them better."

"The pilot also introduced me and helped forge closer relationships with some of my peers - and competitors - and I genuinely made some good new friends."

"It's helped develop a non-work friendship with a fellow mentor"

"[It's] widened my networks"

Organisational Benefits Arising from Mentoring

The Employers' Perspective

Employers were asked whether the pilot had brought tangible benefits to their organisation. Of the six respondents, five agreed and one strongly agreed.

Specific benefits cited included:

"The communications, policy and finance functions in the charity have all been more engaged with fundraising as a result of X setting out the key fundraising issues more clearly."

"An improved understanding and broadening of fundraising activity"

"Maximising our organisation's fundraising potential"

Crucially, such benefits did not come at a cost. When employers were asked whether providing time off for mentoring sessions caused their organisation any problems, five of the six respondents stated that participation had posed no significant problems at any stage, with the sixth respondent being unaware that the sessions had taken place during working hours.

Furthermore, there appeared to be an appreciation of mentoring's value, particularly within small organisations:

"This was very valuable to a small charity that needs to improve its fundraising performance but has only a limited budget for training."

"I think mentoring is an invaluable way for a small charity to progress and provide staff development – for me it is far more valuable than one off training days which have a short impact – mentoring is long lasting and develops staff."

The Mentees' Perspective

When mentees were asked about the benefits/achievements of their mentoring relationships a number of organisational benefits were cited:

"Making a number of practical suggestions to the Board from discussions with my mentor."

"Implementing the text service at our charity as a result of meeting with my mentor."

"This mentoring relationship has enabled me to develop new organisational communication systems/procedures."

"Signposting - this cuts down research time and thus costs to the charity."

At times, evaluating the impact of mentoring can be frustrating as the benefits, such as improving confidence, are difficult to quantify. In this pilot it was fortuitous that some of the mentee responses highlighted the consequences of improving confidence in more tangible terms:

"Building my confidence to be able to take on stepping up into my manager's role while she's been on long-term sick leave."

"My mentor has supported me to develop my confidence in major donor work and encouraged me to 'make the ask' on more than one occasion."

Mentors' Perspective

When mentors were asked about the benefits/achievements of their mentoring relationships they also offered a number of additional organisational benefits:

"Improving the relationship between mentee and trustees."

"Getting a senior member of the XXX foundation to launch a project."

"Watching her confidence improve to the point where she felt able to question her manager appropriately"

"Being instrumental in setting up a fundraisers forum in the area."

"Giving hands on advice/ help with the major donor strategy and helping with donor plans that have resulted in asks and consequently donations."

Analysing the Mentoring Aspect of the Programme

Overview

The previous section outlined the success of the pilot and the impact mentoring made to individuals and organisations.

This section examines the success of the mentoring relationship itself from the perspective of associated feelings, qualities and actions. Specifically, mentees were asked to respond to the following statements;

Feelings and Qualities

- I respect my mentor
- I feel my mentor respects me
- I trust my mentor

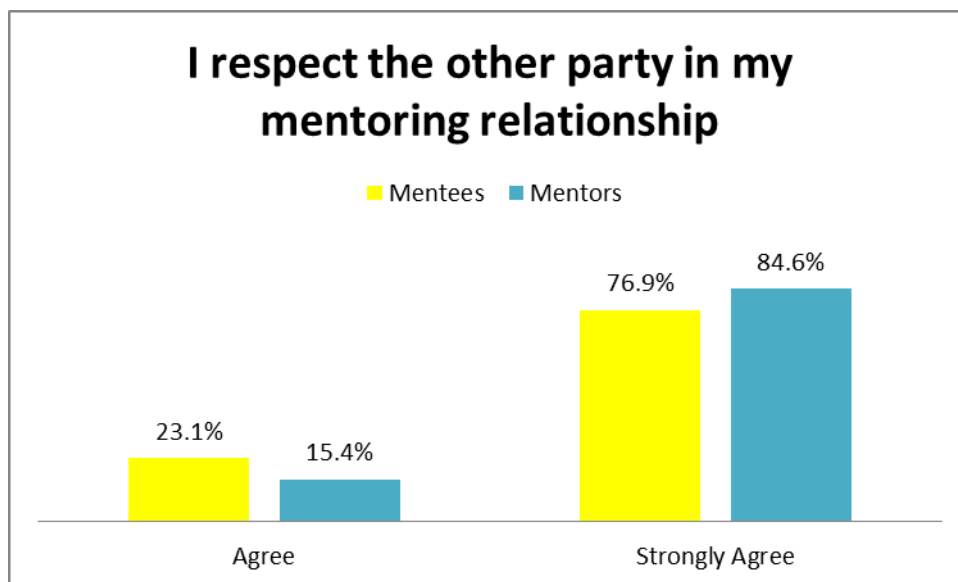
Actions

- My mentor challenges me to explain my thoughts and actions

Equivalent questions were asked of mentors (save for the trust statement).

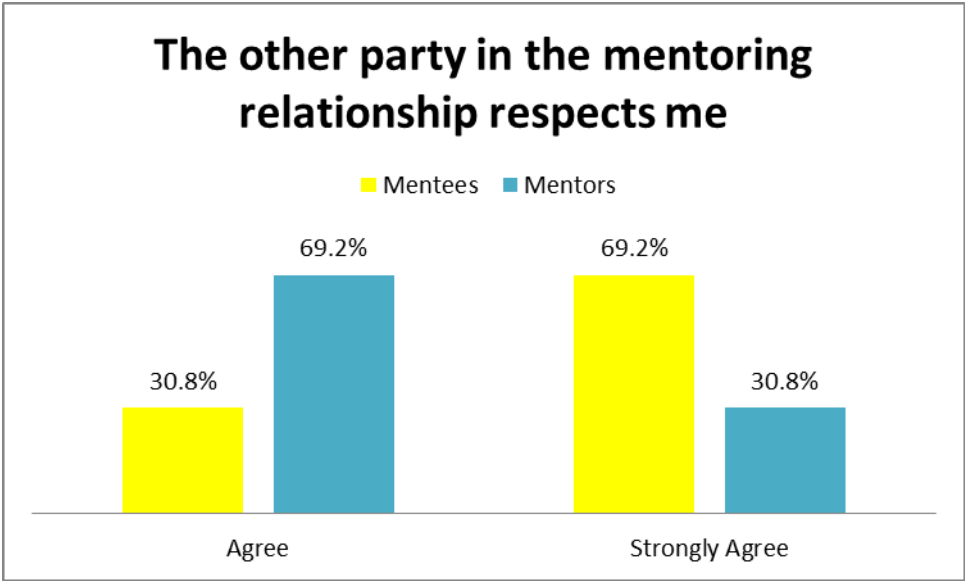
Results

All participants were unanimous in their respect for the other party in their mentoring relationship:



There was also good alignment within each mentoring pair, with 10 of the 13 pairs giving an identical score to that of their partner.

In terms of how respected participants felt, there was still unanimous respect but the weighting was slightly different:

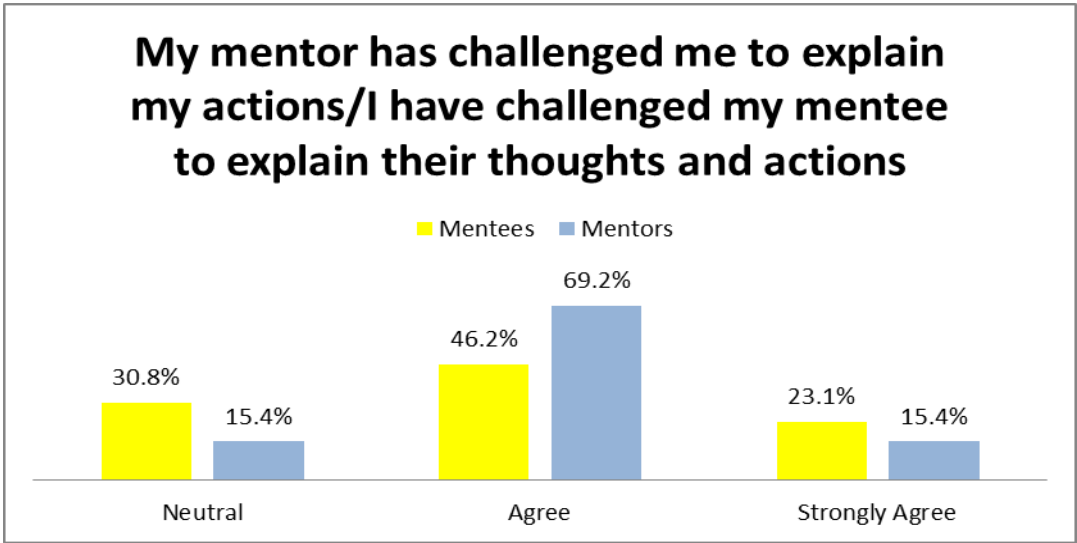


Essentially this result suggests that mentors did not feel respected by mentees as much as mentees felt respected by mentors. The alignment within mentoring pairs was also poor with only six of the thirteen pairs giving their partners identical scores. *mch* is not sure why this should be the case. If the disparity was significant i.e. 69.2% of mentors had selected neutral instead of agree, then this issue would certainly need to be investigated further. However, given that all answers are in the affirmative, such a result could be put down to differing frames of reference in terms of how respect is viewed.

In terms of trust, the result was unanimous, with 10 of the 13 mentees (77%) strongly agreeing and three agreeing that they trusted their mentor.

Such results strongly support the assertion that genuine and strong relationships were formed during the pilot. One way a relationship's strength can be exhibited is through the degree to which mentees are challenged by their mentors: an appetite to have ideas and actions challenged generally only exists within strong, respectful relationships.

Feedback suggests that the majority of mentees were challenged:



It is important to point out that challenging thoughts and actions does not have to occur in mentoring for it to be valuable and considered a success, indeed within specific relationships it may even be inappropriate. Consequently, we should not infer that the 30% of mentees that responded neutrally to the above statement had any less of a mentoring relationship than the 23% that strongly agreed.

Further analysis of the above data shows that there was relatively poor alignment between mentoring pairs with only six pairs giving identical responses. There were no significant differences in response however i.e. there were no cases of a mentor selecting strongly agree and their mentee selecting neutral. Finally, there was no general trend to the discrepancies: the number of cases where the mentor gave a more positive response than their mentee was almost matched by the number of cases where the mentee was more positive. Again such results could be explained by differing interpretations of being challenged/challenging – one person's gentle nudge/suggestion is another person's robust challenge.

The mentoring relationship in itself, featured heavily when mentees were asked to state what they had liked about the pilot, or what they had benefited from/achieved. One mentee captured the simple value of mentoring very succinctly;

“having someone that can listen, advise and ask the right questions.”

As the following quotes illustrate, by fostering such a relationship a mentor's impact can be profound:

“I loved my mentor. I very much benefitted from having her support when I feel I don't have it from my director and trustees. She saved my sanity on many occasions and helped me to sort out priorities and to carry on.”

“[Mentoring's greatest achievement is that it] stopped me drowning. My mentor helped me turn frustration into positive action.”

Given the personal circumstances of certain participants, such support can be very timely;

“Mentoring's greatest achievement was supporting me in a phased return to work after being ill”

The idea of a mentor holding up a mirror to the mentee, so they can appreciate who they really are, is an image frequently used to describe mentoring. Such an approach is particularly useful for mentees with a tendency for being overly self-critical. A mentor can remedy this tendency as indicated by this mentee;

“I trust my mentor and have valued his positive assessment of my achievements to date.”

Another description of mentoring involves the mentor as role model. Such a description is often used when working with young mentees (12-18 year olds), however based on some mentee responses, it was certainly evident in this pilot:

“I have experienced my mentor's passion and development in her role.”

Key Determinants of the Programme's Success and Lessons Learnt

Having articulated the pilot's success from the perspective of mentee development, mentor development and broader organisational benefits, this section of the evaluation examines the key determinants that contributed to forging the strong mentoring relationships which lead to the success.

Numerous articles have been written in relation to the key determinants of a successful mentoring programme and some of these are listed in Appendix Two. Based on these articles and *mch*'s experience in delivering, evaluating and participating in mentoring programmes, the following eight determinants are considered the most important ones that a programme deliverer can realistically influence:

1. Getting the right applicants
 - Ensuring participant motivations are strong, genuine and appropriately intentioned
2. Deciding upon the right number of participants
 - Ensuring the pilot only takes on as many participants as it can manage
3. Providing a comprehensive induction
 - Ensuring participants are clear with respect to pilot's expectations, opportunities and procedures
4. Making the right mentor – mentee matches
 - Ensuring that as strong a 'chemistry' as possible exists between mentoring pairs
5. Developing great mentors
 - Providing sufficient training for mentors and ensuring positive motivations are maintained through setting achievable expectations and making mentors feel appreciated.
6. Providing sufficient on-going support
 - Ensuring participants feel that they are not alone during the course of the pilot

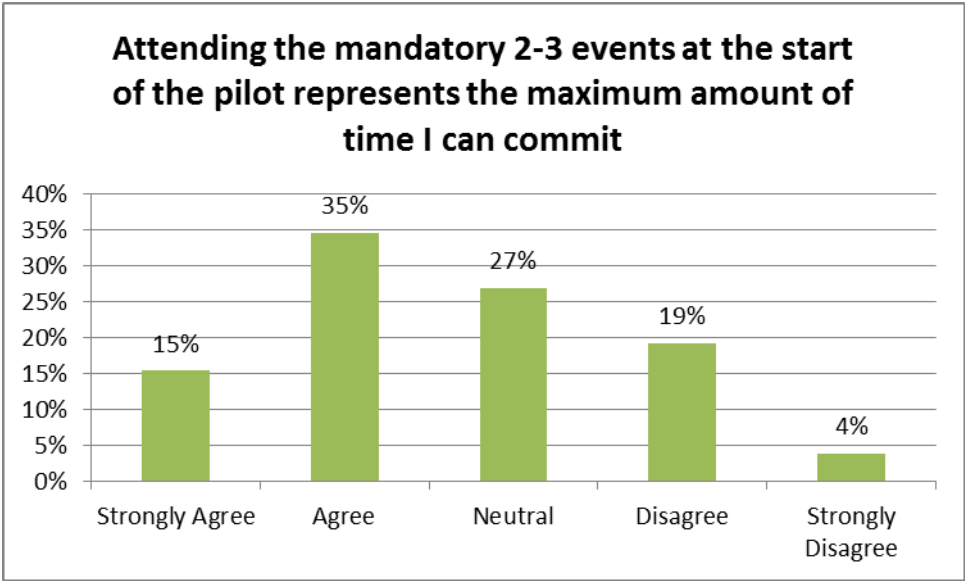
The six determinants have been listed according to the order in which they presented themselves during the course of the pilot. Running through all the above determinants are a further two:

7. Engaging participants in programme design
 - Ensuring participants feel a sense of ownership towards the pilot
8. Delivering all aspects of the pilot in an effective and positive way
 - Ensuring the quality of delivery is consistently high

Responsibility for the ninth determinant ultimately falls to each mentoring pair:

9. Conducting a sufficient number of one to one mentoring sessions

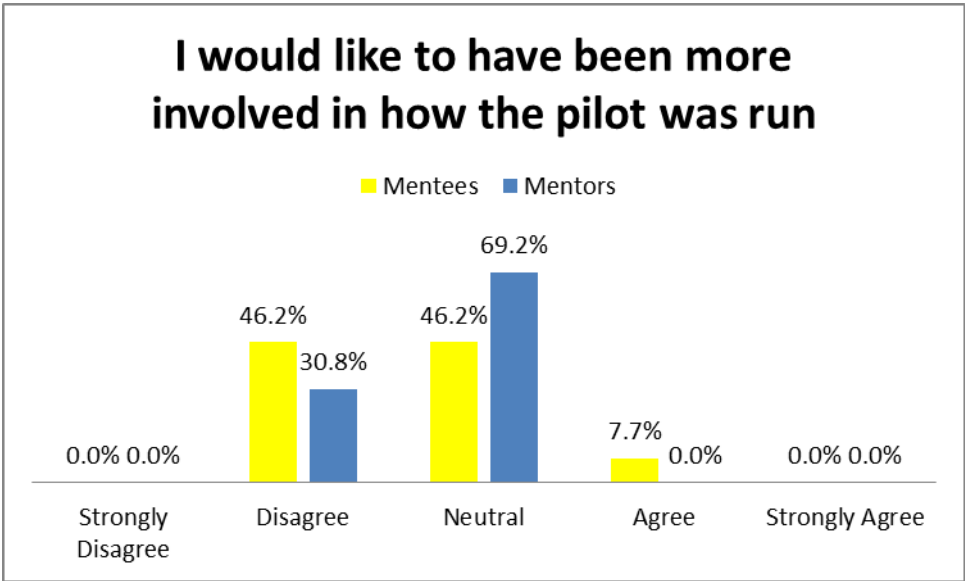
With respect to participant engagement in pilot design, the level of proactive engagement was minimal. This was primarily due to time pressure. IoFSW and mch anticipated that time pressure would be a significant issue for many participants particularly the requirement to attend 1.5 days (mentees) or 2.5 days (mentors) over a two-three week period at the start of the pilot. Subsequent evaluation analysis confirmed our hypothesis:



Data from 26 of the 28 participants, provided after the opening session of the pilot

Given the amount of information that had to be covered in the one and a half days attended by all participants, time pressures were felt in all areas. Specifically, there was a tension between allowing time for engaging participants in programme design and devoting as much time as possible to mentor:mentee discussions and relationship forming. Since mentoring is first and foremost a relationship, priority was given to the latter. Consequently, with the exception of mentor training, participant engagement in programme design was retrospective and provided via evaluation forms at the end of key sessions and some group discussions in the latter half of the pilot. This engagement is summarised for each of the key determinants discussed below.

Based on final feedback however, the lack of engagement was not an issue for the vast majority of participants:



In terms of the quality of delivery, this was dependent largely on key members of the loFSW committee and *mch*. With respect to the loFSW committee members, *mch* considers their contribution to have been exemplary. *mch* was particularly impressed by the amount of time loFSW allowed and devoted to the planning and preparation of the pilot. Also, throughout the delivery stage, the loFSW committee responded quickly to any issues raised by *mch* and gave considerable thought to any decisions that had to be made. Finally, their commitment to the pilot was evident on several occasions when they went beyond what was expected (whether in terms of what was provided to participants or their own time commitments).

With respect to *mch*'s performance, there is a potential conflict of interest in providing comment within this document, given that *mch* was engaged to design, deliver, evaluate and report on the pilot. However, data was recorded on *mch*'s performance throughout the evaluation and this can be provided by loFSW upon request.

One way quality is maintained is through continually iterating policies, procedures, documentation and session content based on feedback and observation. While not documented in this report, countless iterations have already been made to maintain the quality standards for future programmes.

Getting the Right Applicants – The Application Process

Getting the right applicants can itself be broken down into a number of tasks:

- Conducting sufficient promotion
- Setting clear expectations from the beginning
- Using an appropriate selection criteria and checking the motivations of potential participants
- Obtaining sufficient buy-in from employers

Conducting Sufficient Promotion

Action Taken

While previous analysis has outlined that there was high demand for a mentoring programme amongst IoFSW members, significant and sustained amounts of promotion were actioned to make as many interested individuals as possible aware of the pilot. After announcing the pilot at IoFSW's bi-annual conference in October 2009 and asking for expressions of interest (Eols) on the day, a number of further promotional activities were conducted over the subsequent four to five months.

Key promotional activities included:

- Promoting the pilot four times in IoFSW's monthly e-newsletter to all those on its mailing list (October 2009-January 2010)
- Posting a call for expressions of interest on IoFSW's yahoo group in November 2009
- Sending an email from the Chief Executive of IoF to all those on IoFSW's mailing list in January 2010. The email encouraged people to participate in the pilot
- Promoting the pilot through local fundraising groups throughout the South West. Committee members attended groups in Bath, Bristol, Gloucestershire and Cornwall to raise awareness of the pilot
- Asking IoFSW committee members to personally ask individuals within their personal networks who they felt would be appropriate
- Publicising the pilot within the national Third Sector magazine using IoF's regular feature page. The article was written by IoFSW's Chair.
- Publicising the event through local voluntary support organisations such as Voscur (www.voscur.org)

Results

The above promotion helped increase the number of Eols from 25 at the end of IoFSW's annual conference in October 2009 to 66 in January 2010 when the formal application process began. Such an increase was critical to the pilot's success as the initial 25 Eols would have been insufficient to conduct a pilot (particularly since there was an uneven ratio of mentees to mentors).

Setting Clear Expectations

Action Taken

An 18 page pilot prospectus was produced and sent to all those who had expressed an interest in participating. A copy of the prospectus can be obtained from *mch* upon request, however the key aims of the prospectus were to:

1. Provide participants with a clear understanding of the pilot
2. Answer key 'What?', 'When?', 'How?', 'Where?', 'Who?' and 'Why?' questions
3. Clarify what IoFSW meant by mentoring

The prospectus also outlined a number of key requirements/expectations:

- Participants must attend all relevant training and information sessions relating to the pilot in order to be considered
- Participants should be willing and able to devote an average of four hours/month to the mentoring relationship
- Mentees are expected to travel to meet their mentor for face to face meetings
- Where relevant, each participant's employer must 'buy-in' to the pilot by formally committing to allow the participant to attend the relevant training sessions and spend 4 hours of work time/month on mentoring
- Participants must be individual members of the Institute of Fundraising
- Only mentees working for charities with an annual turnover of less than £300,000 can apply for bursaries from IoFSW to assist with their travel costs

The prospectus also explained the following harsh realities of mentoring programmes:

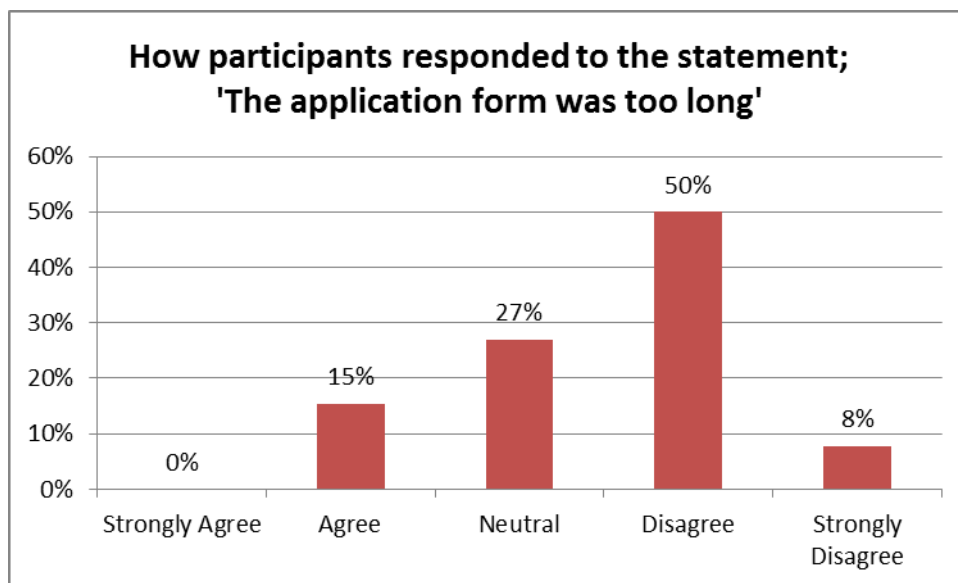
- Perfectly suitable mentee candidates may not be invited to participate
- Attending all the relevant training and information sessions is no guarantee that a participant will take part in a mentoring relationship
- Participants may not get to work with the mentor or mentee they wanted
- A mentoring relationship may not last as long as they expected

Finally, the prospectus outlined the proposed codes of conduct and contract that would be employed for the pilot. In addition to the prospectus, potential participants had to complete an application form of significant length (10 pages for mentors and 11 pages for mentees). Copies of the application form can be obtained from *mch* upon request.

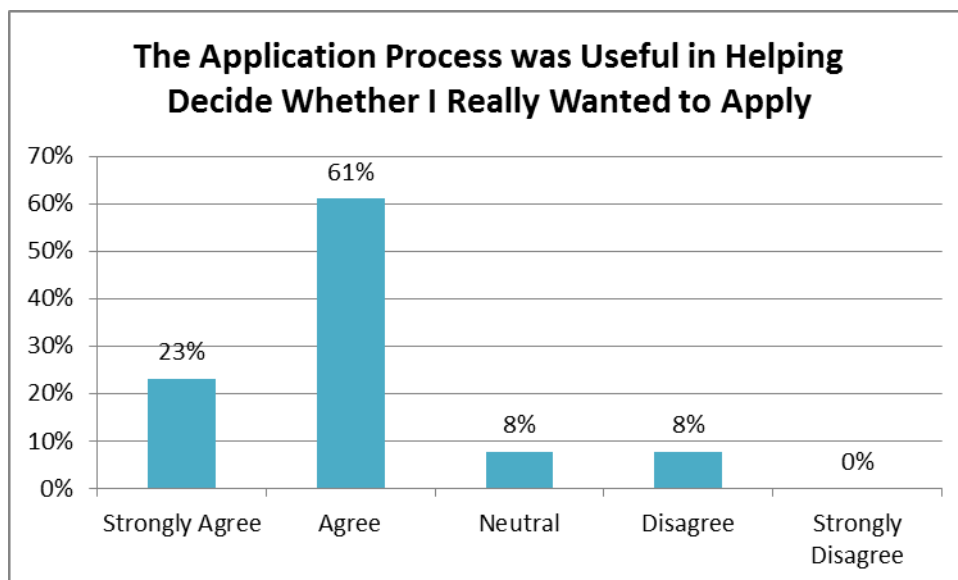
Results

Being completely 'up front' about the pilot, setting stringent conditions for participation and including a significant application form were all considered useful filters for testing participant motivation.

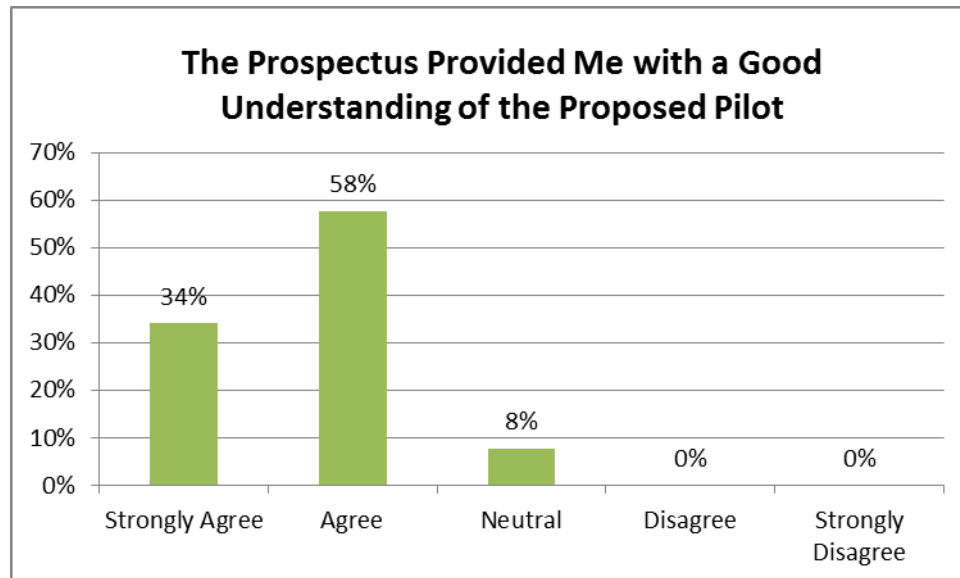
It was obviously important to ensure that the use of stringent conditions did not put off too many suitable people. Based on application numbers, it would appear the right balance was struck: the number of mentors that applied and met the conditions equalled the maximum number that could be accommodated (14) and the number of mentees was slightly more than the maximum (19). Furthermore, the comprehensive nature of the application form did not present an issue for the majority of the 26 (out of 28) participants that completed the relevant evaluation:



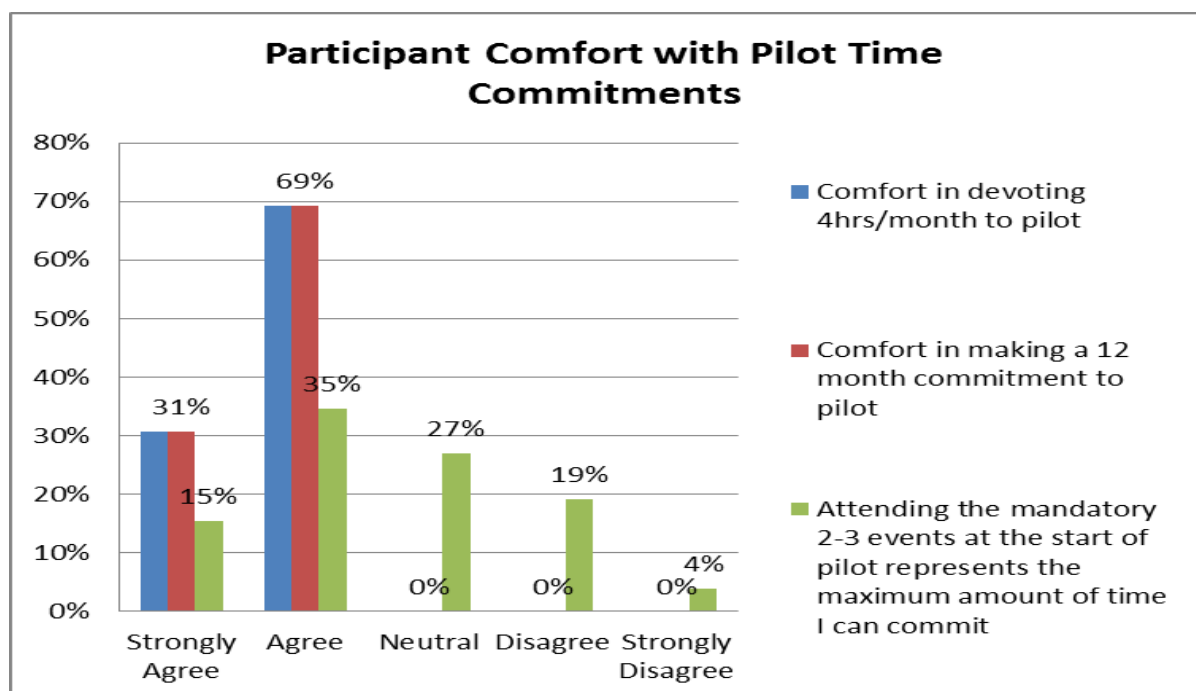
Instead, the application process was considered by many to be useful in deciding whether they really wanted to apply:



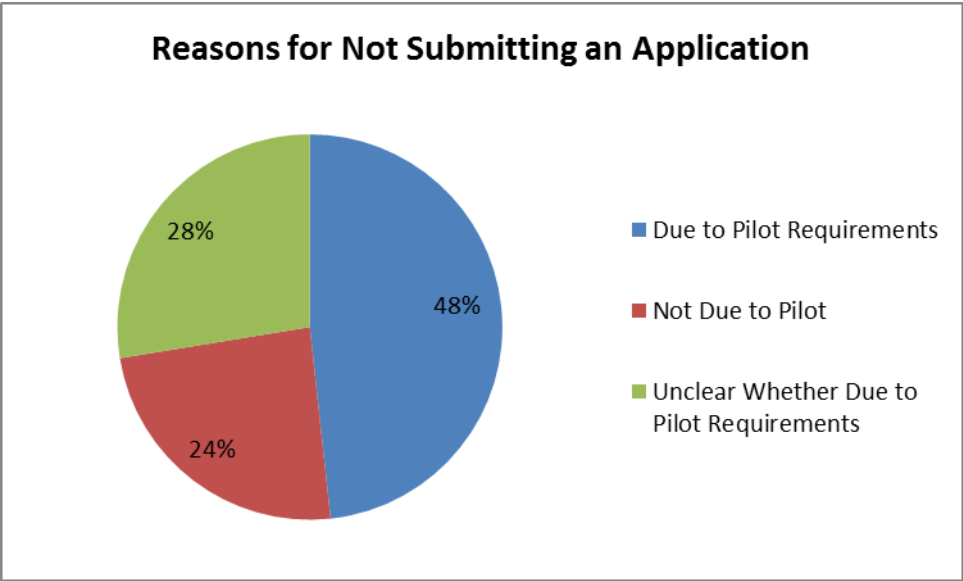
The value of the prospectus was also indicated by participant responses to the following statement:



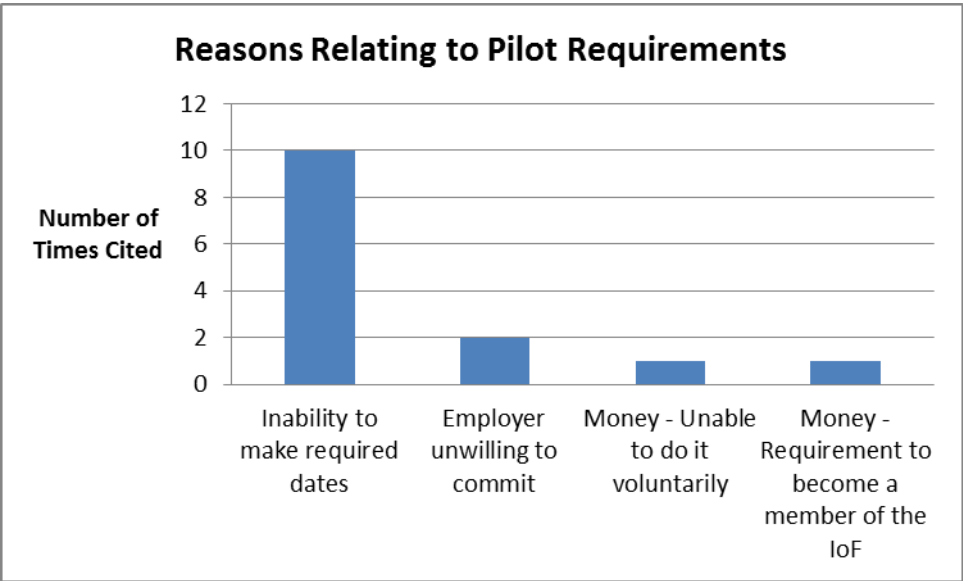
In terms of time commitments, participants seemed very comfortable committing four hours/month over a 12 month period. As outlined previously though, the requirement to attend the introductory session, matching session and training session (if a mentor) was considered by half to represent the maximum amount of time they could commit:



The thirty one people that expressed an initial interest, but did not proceed with an application, were also approached to find out their reasons for not applying. The 25 responses received, suggested that the pilot requirements and application process were issues for nearly half of them:

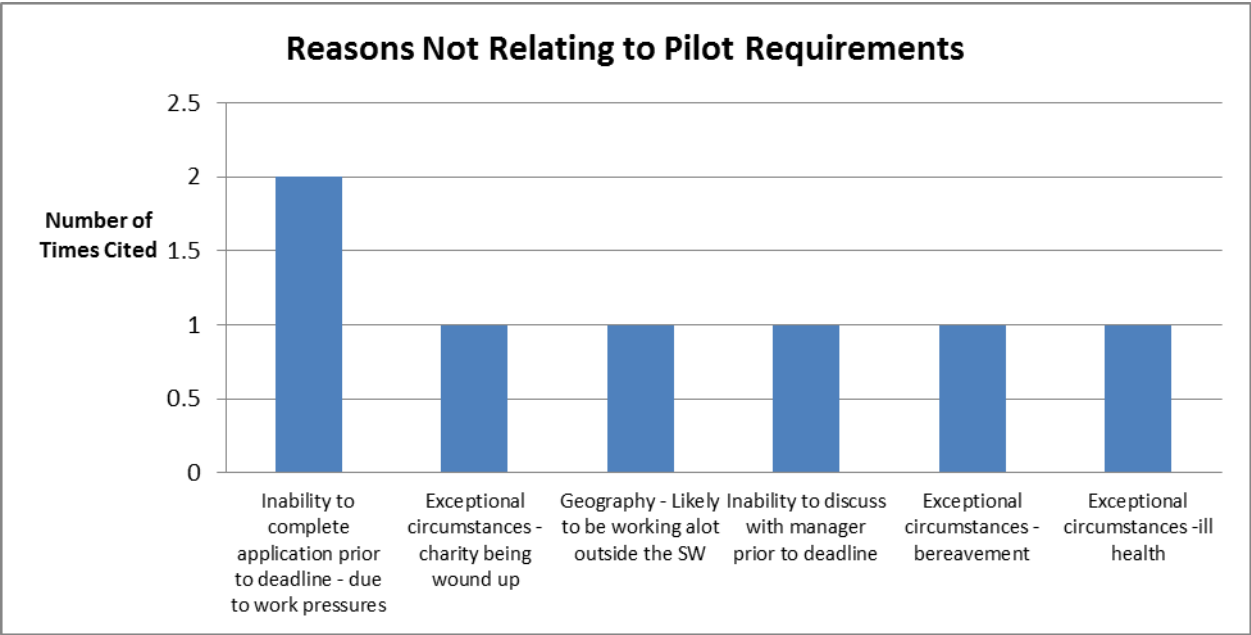


Of the reasons related to pilot requirements, an inability to make all the compulsory sessions was the most frequently cited:



It should be noted the IoFSW did try to offer a degree of flexibility around dates by offering to hold one of the matching sessions on a weekend. In the event, only one or two applicants expressed a preference for a weekend event.

No one reason outside the influence of the pilot dominated:



A single reason accounted for the remaining 28% of responses;

“Time - Likely to be too busy over the coming months”

It was considered ambiguous as to whether this reason related to pilot requirements. For some, the pilot's requirement of committing four hours/month may have been too much. For others, changes in personal circumstances between expressing an interest and receiving the prospectus/application may have been the sole cause.

Checking Motivations and Using an Appropriate Selection Criteria

Mentors

Action Taken

In an ideal world, mentors would have been selected using a combination of face to face discussions, observation of their performance in potential mentoring scenarios and application forms. For financial and logistical reasons though, this was impractical.

Given that mentor training was a compulsory part of the pilot, mentor motivation rather than previous mentoring experience was considered the most important prerequisite for participation. Such prioritisation was based on *mch*'s experience of it being far easier to develop the required skills in motivated people, than to try and motivate unmotivated (but experienced) individuals. Furthermore, experience does not always guarantee quality and verification of the latter requires direct observation or (less satisfactorily) references.

If experience had been considered important, it would have posed significant problems for the pilot as only 27% of mentor applicants had formal experience of being a mentor, although 67% had some informal experience.

Given the previously discussed requirements and expectations of the pilot, completion of an application form was considered a significant illustration of motivation and commitment. Furthermore, the application form explicitly asked mentors to explain their motivations for participating. *mch* checked the answers to ensure the motivations were focused on assisting in the development of a potential mentee, rather than their own development. Fortunately, no responses gave *mch* grounds for concern.

It should be noted that references were not taken in relation to mentors. This was partly in an attempt to reduce the administrative burden of the pilot, but mainly due to *mch*'s belief that references would be unlikely to uncover any serious impediments to a candidate's suitability to mentor. Instead the requirements to complete an application form, attend three sessions at their own expense and complete a year's mentoring on a voluntary basis were considered sufficiently robust checks as to a mentor's motivations.

Results

Motivations

At the end of the pilot, when mentors were asked what they had liked most about the pilot, 10 of the 13 offered a response which essentially revolved around the satisfaction and happiness that comes from helping someone else. Indicative responses included:

"It was good to feel that I could give something back to the sector – I've been supported throughout my career by other fundraisers who have been willing to share ideas, experience and information, and it was good to be able to offer that to someone else."

"Being part of a worthwhile scheme that will continue to help so many others in and out of the sector."

In *mch*'s view, the level and nature of such responses strongly indicates that the pilot mentor cohort was motivated for the right reasons.

Application Criteria

While *mch* received 18 mentor applications, four subsequently had to withdraw due to an inability to attend the compulsory information, matching and training sessions. As previously outlined, 14 mentoring pairs were considered the maximum for the pilot and so there was no need to 'reject' any valid applications. If the pilot had been oversubscribed *mch* would have tried to prioritise the applications by 'grading' certain parts of the application forms. This would have been difficult though, and so the IoFSW committee's personal knowledge of applicants would have been in the selection process.

Mentees

Action Taken

There were 19 applicants for 14 mentee places. As had been outlined in the prospectus, in the event of the pilot being oversubscribed, preference would be given to those:

- Working in smaller organisations (those with a turnover of under £1 million)
- Working within charities as opposed to private sector consultants
- Who were managing or delivering fundraising alone
- Who were being managed by those with little or no fundraising experience
- Who did not already have a mentor
- From underrepresented geographical areas
- With a clear development issue

All information relating to the above criteria was obtained from the application forms. Objective decisions could be made in relation to all but the last issue – having clear development issues. Assessment of this latter issue was based on:

- Whether the participant stated a development issue in their application
- *mch*'s view on the compelling nature of the issue and mentoring's ability to assist
- Analysis of participant scores from a skills and attitudes self-assessment

Results

Fortunately, the above criteria lead to a relatively clear separation between the 14th and 15th ranked applicant. The only unexpected issue that emerged during mentee recruitment was an application from a fundraising consultant. Since they scored very highly in the above criteria the consultant was selected, however the question of whether private sector consultants should receive free mentoring support was raised by some within the IoFSW committee.

Obtaining Sufficient buy-in from Employers

Action Taken

It was considered important to position mentoring as something that was done within working hours, rather than as an added activity to be fitted into evenings and weekends. This was because people are often not at their best/most attentive after a full day's work. Furthermore, it was felt that participant motivation could be unduly tested if mentoring started to encroach on personal/family time.

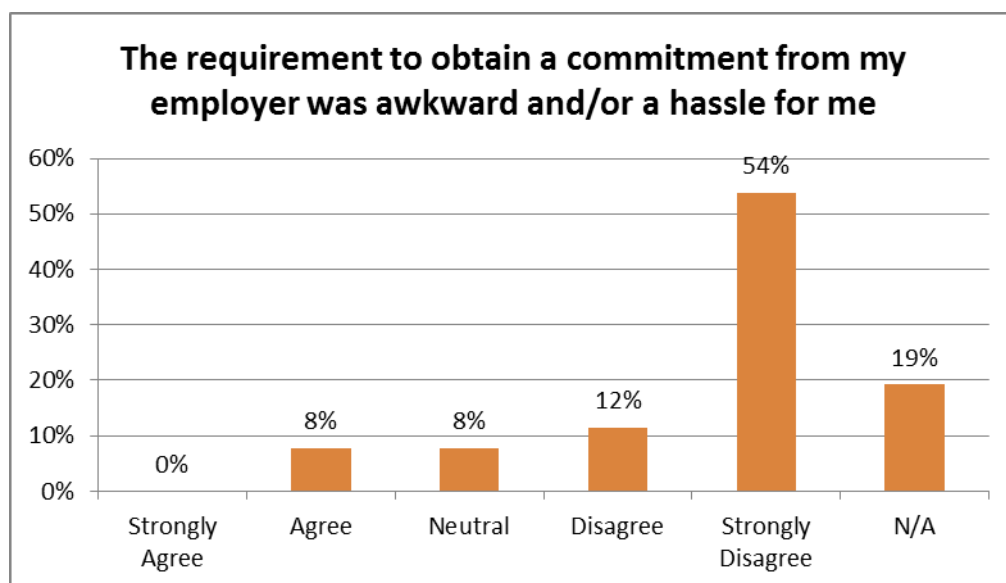
Consequently, employer 'buy-in' was encouraged for participation. While not mandatory, it was made clear in the prospectus that failure to obtain employer support would lead to the participant needing to take annual leave in order to conduct the training and mentoring sessions. Furthermore, the ability to match them would be dependent on another participant being willing to conduct the mentoring during evenings/weekends.

To gain employer 'buy-in', applicants provided the contact details of their direct line manager in their application. *mch* then contacted the manager by email and provided them with an overview of the pilot and the potential benefits of mentoring. They were then asked to sign and return an employer commitment form (see Appendix Three).

Results

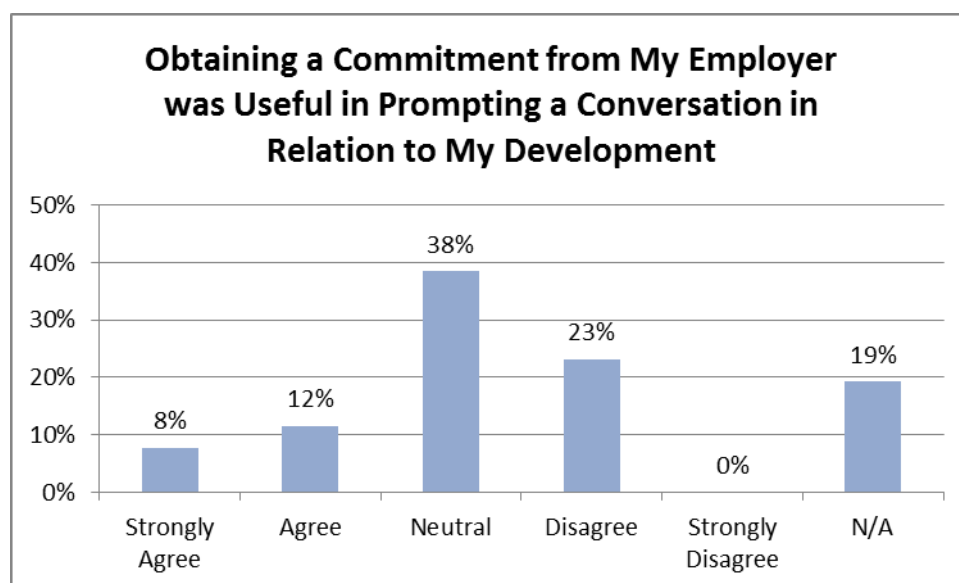
The fact that all applicants chose to proceed on the basis of obtaining their employer's commitment (if applicable) suggests that they shared IoFSW's desire for mentoring to be conducted during working hours.

Furthermore, feedback suggests obtaining employer feedback was not problematic for the majority of participants:



N/A = Not applicable and was selected by freelance consultants participating in the pilot

For a minority of participants, an added benefit of gaining employer commitment was the conversations it prompted:



As previously outlined, only two employees were unwilling to provide their support. This suggests that the vast majority of employers appreciated that the benefits of the mentoring programme were likely to far outweigh the drawbacks.

Participant Engagement with Respect to the Application Process

Participants were retrospectively engaged with respect to the application process at the pilot's opening session. Encouragingly only four suggested changes were provided from the 26 participants that completed evaluations:

- (i) Add a pre-application briefing session to future programmes to give potential applicants a better idea of the pilot (cited by two people)
- (ii) Make it clearer as to how the pilot's evaluation will be used (cited once)
- (iii) Make it clearer that mentors and mentees will be able to state preferences with respect to the matching process (cited once)
- (iv) Reduce the 'tick boxes' in the application (one participant felt they were "superfluous")

A further suggestion was made during evaluation work conducted after the matching process (two to three months into the mentoring):

- (v) Check whether mentees, or their charities, are already receiving any external support in terms of fundraising

This suggestion was made by a mentor because their mentee was working with a fundraising consultant who had been brought in by their charity. While this situation had not created any problems within their mentoring relationship, the mentor felt he had to be extremely careful with any guidance and support he gave, in case it (unknowingly) conflicted with advice given by the consultant.

Recommendations with Respect to the Application Process

Of the participant suggestions listed above, (ii) and (iii) could be easily incorporated and should be implemented. In terms of (iv) *mch* also believes the application forms would benefit from being streamlined a little. However, the vast majority of the 'tick boxes' provided essential information for the selection and matching steps of the pilot and so care would have to be taken when reducing the length of the application forms.

In terms of suggestion (v) the application process did check whether each mentee was currently being mentored. Furthermore, if a mentee was being mentored, it was ascertained whether they were being mentored by any of the potential mentor applicants. *mch* is not sure of the value of investigating whether a mentee's organisation is obtaining fundraising advice/consultancy from external sources. While such a scenario does present issues for a mentoring relationship, *mch* believes that it is best handled on a case by case basis by the mentor and mentee (with support from the pilot delivery team if required).

Suggestion (i) would be the most time consuming (and expensive) suggestion to implement. If the IoFSW committee had volunteers that were sufficiently able to deliver a briefing session and a free venue could be found to host it, then it could be considered. In *mch*'s view though, implementing such a session could end up duplicating much of the information provided at the opening session. An alternative approach could be an alumni contact list. Alumni would volunteer to be on the list and prospective applicants could contact them to gain more of an insight into the programme.

Based on *mch*'s experience, additional recommendations are that future programmes do **not** allow:

- (i) Mentors to mentor more than one participating mentee
- (ii) Applicants to apply to be both a mentor and mentee

The pilot application forms did allow for these possibilities (as a means of maximising the number of potential mentors). Fortunately, neither option was taken up by any applicant as *mch* believes that the resulting matching process would have been unworkable.

Finally, *mch* believes IoFSW should also:

- (i) Consider how to maintain a healthy number of mentor applications

While it is heartening that IoFSW comfortably met its target of 14 mentors for the pilot, it did not have a genuine waiting list. By this, *mch* means that if one of the 14 mentors had dropped out at the last minute, there was a list of four other mentors that could have been asked to fill their place. However, each of the four replacements would either have been unable to attend the introductory session or the mentor training. Such a situation would have been far from ideal.

Given that some mentoring relationships spent a significant amount of time (and in one or two cases an almost exclusive amount of time) on non-fundraising issues, IoFSW could consider recruiting mentors from non-fundraising roles and perhaps even skilled individuals from outside the third sector. If IoFSW is successful at increasing mentor applications to the point where there is a genuine waiting list, it would need to clarify its mentor selection policy

- (ii) Canvass opinion in relation to selecting fundraising consultants as mentees

Deciding Upon an Appropriate Number of Participants

Action Taken

Essentially, the number of participants was determined by the requirements for good matching. The size of the The South West region meant that more than one matching session was required on the basis of simple geography. Quality and budgetary issues however meant that the number of sessions could not exceed two. Consequently, one matching event aimed to cater for those based in the Southern part of the region while the other catered for those in the North.

For each matching session, loFSW and *mch* felt as much time as possible should be spent on one to one conversations between mentors and mentees. This stance, together with the fact that the matching sessions had to cover other issues (e.g. codes of conduct and mentoring contracts) meant there was simply not enough time for more than seven one to one conversations. Even if time had not been such a constraint, it was felt that any more than seven conversations would be too draining on participants.

Results

These constraints meant the pilot was restricted to 14 mentors and 14 mentees. If loFSW and *mch* had not made attendance at all sessions mandatory and not placed such importance on the one to one relationships, more participants could have been selected. However, it was felt that doing so would have compromised the quality and integrity of the pilot.

Qualitative feedback from the matching sessions also suggested that seven conversations in a single day was the maximum number possible. Indeed, feedback from a number of participants suggested the matching sessions could be improved by reducing each matching session to six mentors and six mentees.

As a comparison, a recent mentoring pilot delivered by Fundraising Ireland (which *mch* assisted with) had matching sessions involving five mentors and five mentees. Such numbers had two clear benefits:

- (i) It allowed far more one to one time between prospective mentors and mentees
- (ii) It appeared to make the final matching process far easier as there were far fewer possible combinations/matching scenarios

Although it did not arise during the Fundraising Ireland pilot, there is a potential risk that fewer matching options increases the likelihood of someone not being matched.

Recommendation with Respect to Participant Numbers

Future participant numbers should be dictated by the number of matching sessions loFSW feels it can deliver. Subject to them meeting all necessary requirements, the number of mentors/mentees selected would then be the number of matching sessions times five, six or seven.

Providing a Comprehensive Induction

Action Taken

From the perspective of successful participants, the pilot began in earnest with a compulsory, half-day opening session. There were several aims to this session:

(i) Clarification

The session aimed to review the concept of mentoring and clarify its distinctiveness from other professional relationships e.g. coaching. This would allow participants with a further opportunity to assess whether the programme was right for them.

(ii) Delivery

Participants were given an outline of the forthcoming matching sessions and attendances at each of the two sessions were confirmed.

(iii) Interaction

While all participants were encouraged to meet one another, there was dedicated time to ensure all mentors and mentees (that were going to be at the same matching session) spoke with one another.

A full overview of the opening session's content can be obtained from *mch* on request. Essentially though, the session consisted of three main parts:

Part 1: Clarifying Mentoring

This part outlined the:

- Definitions, characteristics and the qualities of successful mentoring
- Beliefs, skills and knowledge required of mentors and mentees
- Types of relationships mentoring could encompass

Part 2: Participant Introductions

Participants were split into two groups according to the matching session they were going to attend. Within each group, participants were 'arranged' such that every mentee could speak with every mentor. The discussions were structured such that two to three mentees spent around 15-20 minutes speaking with the same number of mentors. After completing introductions, participants were asked to focus their conversations on one of three questions:

- (i) What are the biggest challenges you face in fundraising?
- (ii) What are the biggest challenges you face in your wider work?
- (iii) What do you hope to gain from /contribute to this pilot?

It was left to participants to decide whether they wanted to approach the question as a group or as rotating pairs. The indicative amount of time a mentee engaged with a single mentor was around five to ten minutes. While not long, it was hoped that these conversations would:

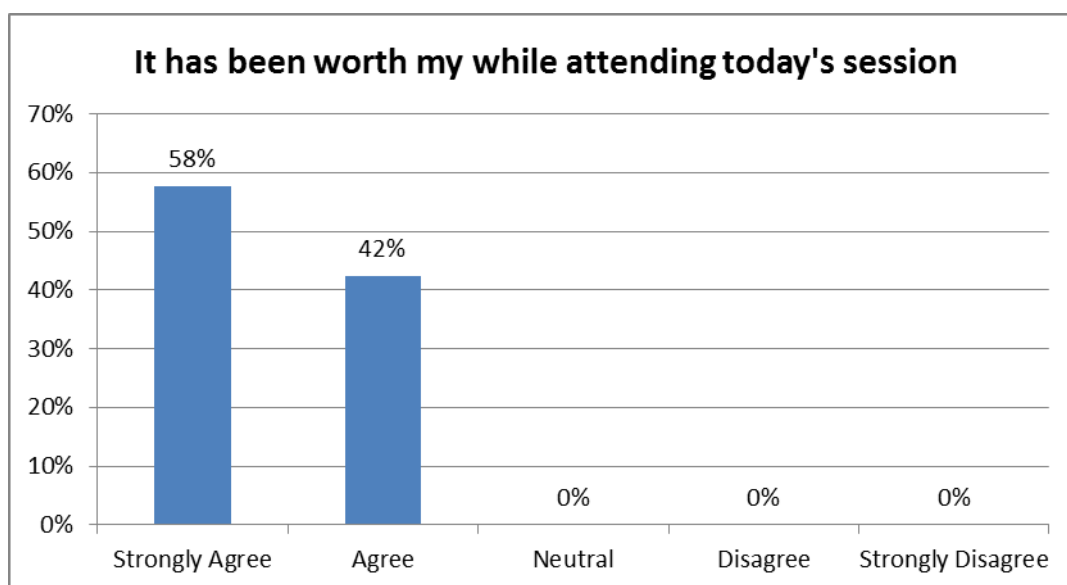
- (i) Ensure participants were not starting their forthcoming matching sessions 'cold' i.e. everyone would recognise each other and have already covered the pleasantries of names and 'what do you do?'
- (ii) Start participants thinking about potential matches based on the initial 'chemistry' of the discussions

Part 3: Looking Ahead

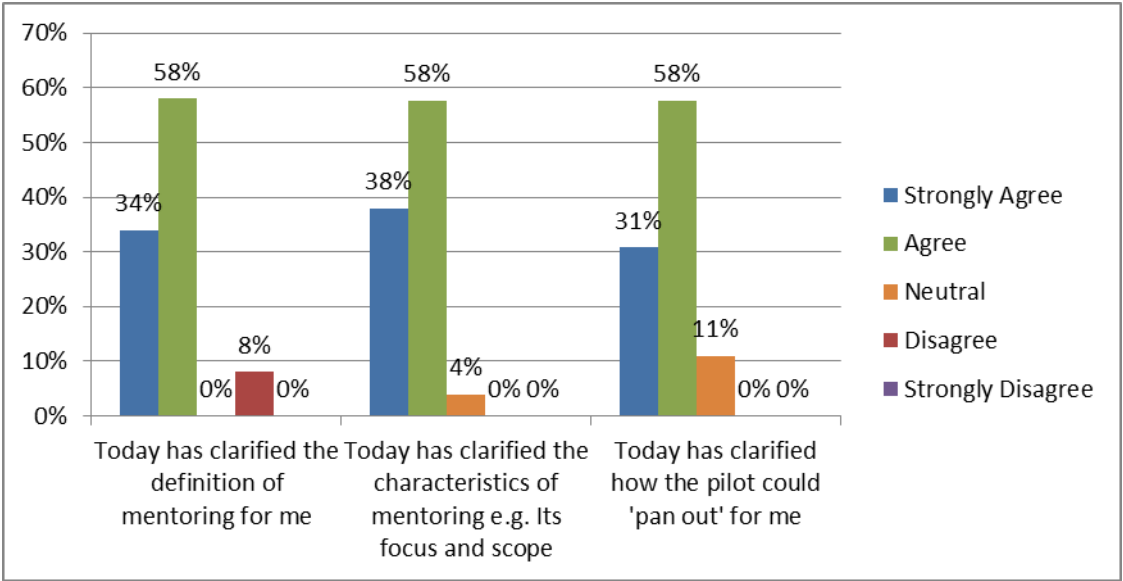
This part outlined next steps and all the pilot's key phases. It also tried to 'paint a picture' of what the pilot could 'look like' for participants. Finally, it tried to illustrate the potential impact of mentoring through the personal mentoring experiences of the *mch* trainer delivering the session.

Results

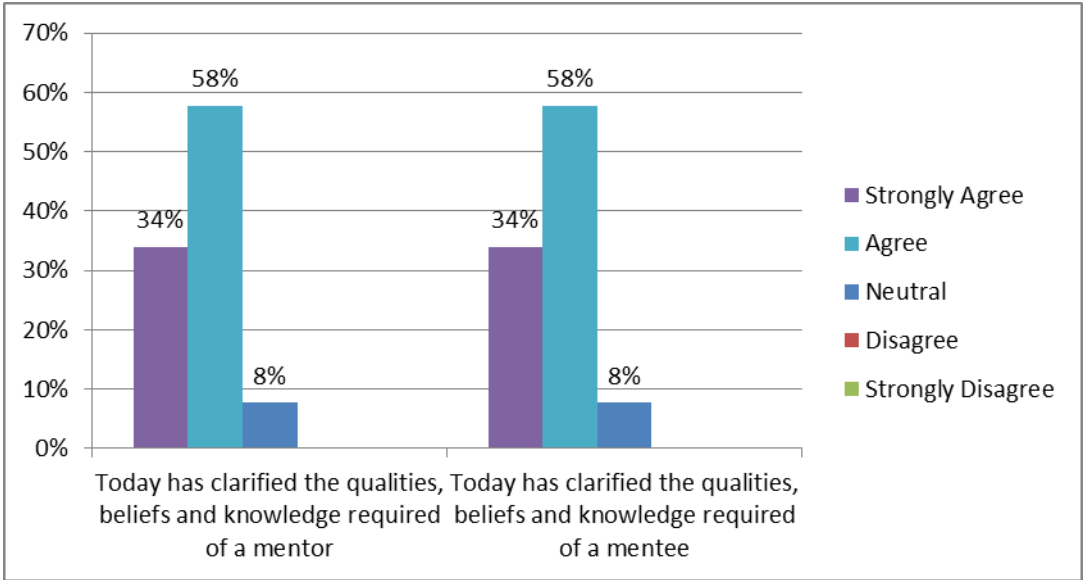
Given the busy lives of participants and the voluntary nature of the pilot, *mch* believes the overarching success of the opening session is best illustrated by responses to the following evaluation statement:



The session also appeared to be successful with respect to some of its specific aims:



Mentors and mentees also appeared to leave the session with a good understanding of the qualities, beliefs and knowledge they would need to 'bring' to mentoring:

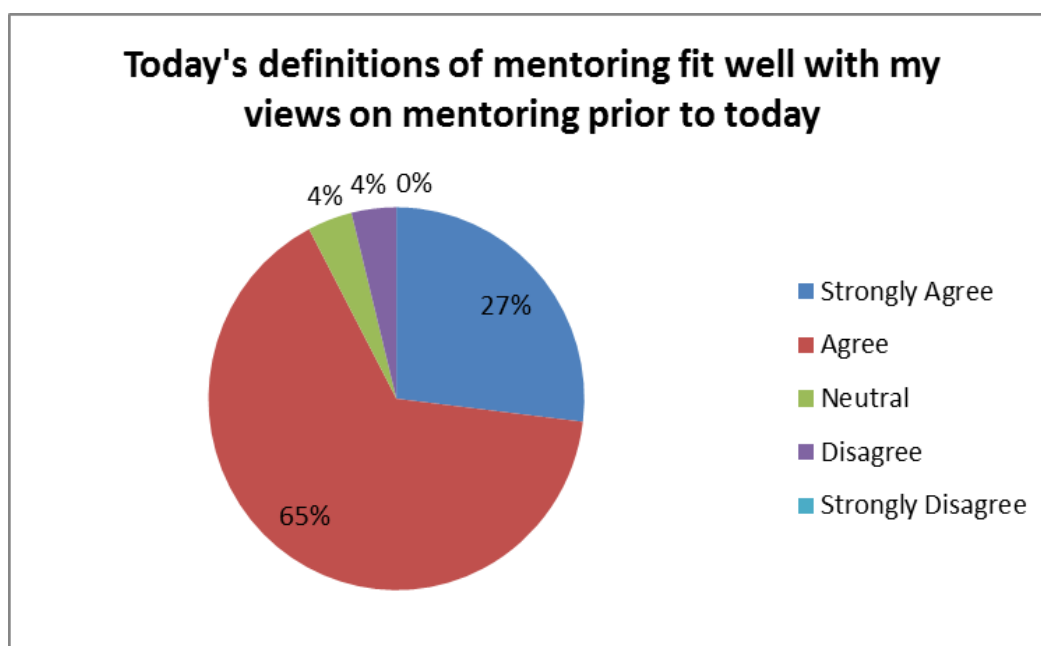


Participant Engagement in Induction

The tension between maximising the time available for mentor-mentee interaction and engaging participants in the pilot design has previously been mentioned. During the planning stage of the opening session, it was initially hoped that both could be conducted concurrently. During part two of the session, it was proposed that instead of asking participants; "What they hoped to gain from/contribute to the pilot?", a facilitated discussion around their ideas for the pilot could be conducted. In the end, it was felt that the small amount of time available, together with the complexity of facilitating the discussions would compromise this whole part of the session.

In *mch*'s view, a key potential area for participant engagement at the early stage of a pilot concerns what is actually meant by mentoring. In certain respects, it was a risk to start loFSW's mentoring pilot with a predetermined view on mentoring which was only discussed between *mch* and two loFSW committee members. However, loFSW and *mch* mitigated against this risk, by proposing three definitions of mentoring, rather than tying the pilot to just one. Also these definitions featured prominently in the initial prospectus, so that early signs of discontent around the definitions could be obtained. Furthermore, *mch*'s previous experience of mentoring projects provided confidence that the proposed definitions would be appropriate.

Based on *mch*'s experience, it is also important to point out that participant engagement in fundamental issues like defining mentoring, is itself a risk. This is because it can be very time consuming and rather than leading to greater consensus, can prove divisive. Fortunately, participant engagement 'after the fact' suggested the vast majority were happy with the definitions of mentoring proposed:



In terms of other content areas, nine participants provided seven suggestions for improving the opening session. All suggestions were cited once unless otherwise stated:

- (i) Have more discussion time between mentors and mentees (cited by four people)
- (ii) Provide a list of participants prior to the event
- (iii) Stress that mentors are unlikely to have all the “answers” that mentees may be looking for
- (iv) Use case studies from the IoFSW pilot in future sessions (rather than the non-fundraising experiences of the *mch* trainer delivering the course)
- (v) Involve IoFSW mentoring pilot alumni in the delivery of future sessions
- (vi) Have more discussions on the definition of mentoring
- (vii) Have a choice of dates for the opening session

Recommendations in Relation to Future Inductions

In *mch*'s view, suggestions (i) – (v) could be incorporated easily into future programmes at little additional cost. The only key requirement for suggestion (i) would be that future opening sessions are longer than the pilot's. Based on the pilot, this is unlikely to be problematic as while billed as a 9.30am – 12.30pm event, it finished before midday.

In addition to mentees spending more time with the mentors that will be attending their matching session, *mch* would also recommend that dedicated time is given over for all mentees and all mentors to meet together separately. Providing such time could help initiate the peer networking/relationship building that proved so important to so many pilot participants.

mch would not recommend providing time (other than break times) for mentees to speak with mentors that are not going to be at their matching session. The reason being is that such discussions run the risk of a mentee connecting with a mentor that is not scheduled to be present on their matching day. Any subsequent requests to change their matching day would be very disruptive to future organisers and other participants.

Suggestion (vi) could certainly be considered, however as previously outlined there is a risk that the session could get side-tracked by this one issue.

While lack of choice with respect to session dates undoubtedly inconveniences some, *mch* would not recommend offering a choice of dates. This is because part of the opening session's value is that every participant gets to meet (almost) every other participant. If several opening sessions were delivered (with the same size of cohort), the number of mentees meeting mentors for the first time at their matching session would increase and this would not be helpful for the overall matching process.

Making the Right Mentor – Mentee Matches

Prior to the Matching Sessions

Action Taken

Preliminary matching issues were considered in parallel with the participant selection process. Firstly, it was ensured an equal and even number of mentors and mentees were able to attend the two matching sessions. This was only made possible by certain mentors and mentees being allocated a place on their less preferred matching session. This had potential consequences for their matching options, namely that it was more likely that they would be matched with someone that lived a long way away from them.

It was also ensured that there were no practical issues or preferences that could make matching difficult. The following key aspects were collectively considered:

Availability

It was checked that, in principle, it was possible to match all mentors and mentees based on times when they were available for mentoring.

E.g. If five mentors had stipulated that they were only available at weekends and only three mentees had stated they are available at weekends then this could have posed a problem for matching.

Regularity

It was ensured that there was no collective misalignment between how often mentors wanted to mentor and mentees wanted to be mentored.

E.g. If five mentors had stipulated that they did not want to meet their mentee more than once a month at any stage of the process and all mentees wanted their mentees to be amenable to meeting twice a month at any stage, then this could have posed a problem for matching.

Types of Contact

It was ensured that there was no collective misalignment between how mentors and mentees wanted to interact with one another.

E.g. If five mentors had stipulated that they only wanted to meet their mentees face to face, but all mentees wanted to use a combination of face to face, phone and email, then this could have posed a problem for matching.

Scope

It was ensured that there was no collective misalignment between mentors and mentees in relation to the desired scope of the mentoring.

E.g. If all mentors had stipulated that they only wanted the mentoring to focus on fundraising, but 10 mentees stipulated a desire to discuss a combination of fundraising, general work and personal issues, then this could have posed a problem for matching.

Gender Preference

It was ensured that there was no collective misalignment between mentors and mentees in relation to the preferred gender of their mentee/mentor.

E.g. If five mentors had stipulated that it was important to be matched with a male mentee, and there were only three male mentees, then this could have posed a problem for matching.

Geography/Ability to Travel

It was ensured that there was no collective misalignment between mentors and mentees in relation to their geography/willingness to travel.

E.g. If three mentees were located in the same location, 90 minutes drive from the nearest mentor and none of the mentees stated they were willing to travel more than an hour, then this could have posed a problem for matching.

All the above information was obtained from the application forms. Fortunately, none of these issues caused any problems and at this point all successful applicants were informed. It should be stressed that these practical issues constituted the limit of *mch*'s intervention with respect to deciding matching session places. *mch* did not attempt to place mentees or mentors in specific matching sessions based on development issues or specific experience. The reasons for not doing so were based on an acknowledgement of three key issues:

(i) The ingredients for successful mentoring

- *mch*'s experience suggested that a relationship's 'chemistry' is a stronger determinant of mentoring's success than 'on paper' similarities between experience and desired goals

(ii) The likelihood for change

- *mch*'s experience suggested that the goals of mentees very often change through the mentoring process, so basing matches on preliminary goals could threaten the likelihood of a long term relationship developing. The following quote provided by a mentee after their matching session illustrates this point;

"My expectations...have been dramatically altered during the day. The 1:1 sessions questioned my ambition, confidence and skill levels. I feel I have very different developmental issues [from those] I was willing to admit to prior to the programme."

(iii) Complexity

- Trying to match on the basis of experience and goals *and* all the previously outlined practical issues was unlikely to be workable

During the Matching Sessions

Action Taken

The focus of the matching sessions was one to one conversations between mentors and mentees. Each mentee had a 20 minute one to one conversation with each mentor. The conversations were interspersed throughout the day. To structure the conversations, participants were asked to complete two tasks:

1. 'Talk Shop'

Mentees explained what they wanted from a mentor and mentors explained their experience. During the course of the discussion it was hoped participants would gain a sense of whether being matched with this person would be both useful and practical. To aid this particular discussion, participants were given a 'matching grid' which listed the types of issues that would be useful to discuss, a copy of which can be obtained from *mch* upon request.

2. Discuss a Topic

Each one to one conversation discussed one of the following topics:

- i. What are your likes and dislikes?
- ii. When dealing with change:
 - What do you do well?
 - What things could you improve upon?
- iii. Describe your ordinary world
- iv. What is your dream?
- v. What is holding you back from your dream?
- vi. Why do you do what you do?
- vii. What are your values?

This part of the conversation aimed to test the 'chemistry' of any subsequent relationship. It was also valuable if significant issues emerged in the 'Talking Shop' phase which meant a match was unlikely. This is because participants could still use the time for personal reflection, which is an important part of good mentoring.

In addition to one to one conversations, the matching session focused on:

- (i) Clarifying what mentees needed/wanted and what mentors felt they could provide
 - Initially, mentors and mentees worked in separate groups to discuss these issues and then the views of both mentees and mentors were discussed together
- (ii) Introducing the importance of body language
- (iii) Outlining the matching process in detail
- (iv) Reviewing the codes of conduct, mentoring contracts and practical guide to mentoring

- The practical guide was a 15 page document developed by *mch* to provide practical tips for developing, sustaining and ending a mentoring relationship

(v) Stating preferences

- In private, each mentee listed their preferences with respect to the mentors they wanted to be matched with. The full set of 'rules' in relation to stating preferences can be obtained from *mch* upon request, however mentees were essentially asked to rank the mentors from one (mentor they would most like to be matched with) to seven (mentor they would least like to be matched with). Mentees could give several mentors the same ranking and could also put a "No" next to a mentor's name to denote that they would not want to be matched with this person. Mentors conducted the same preference process with respect to mentees.

A full overview of the content covered in each matching session can be obtained from *mch* upon request.

Once participants had stated their preferences, *mch* matched participants in such a way as to maximise the number of first and second choices, while still generating as favourable a collective matching score as possible.

Results

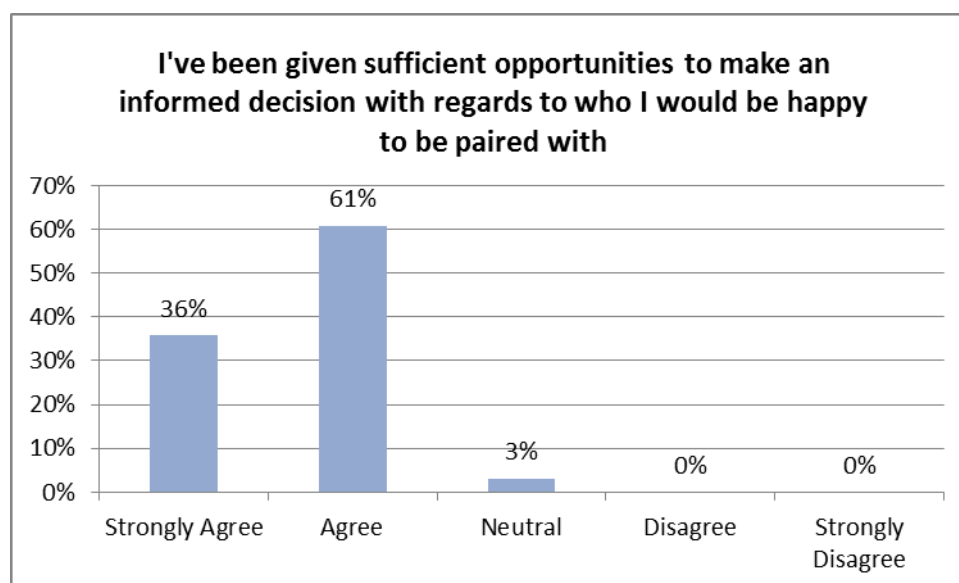
The initial success of the matching sessions was measured primarily by:

- The extent to which participants felt they could make an informed decision with regards to who they would be happy to be matched with
- The clarity with which participants felt they could proceed with the first few mentoring sessions

The success of the matching process was also measured two to three months after participants had been matched by:

- Participant happiness about the matching process

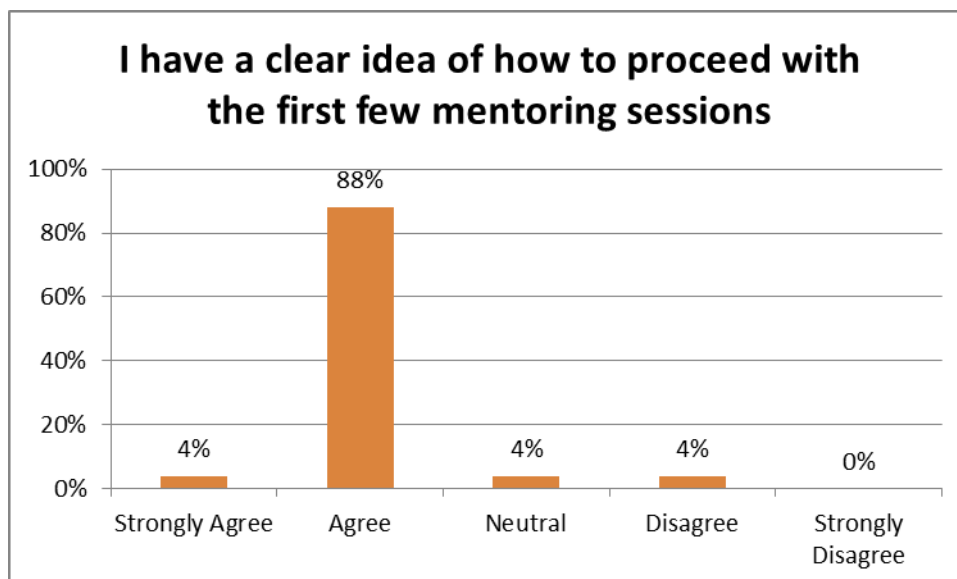
In terms of the first measure, the vast majority of participants felt they were able to make an informed decision:



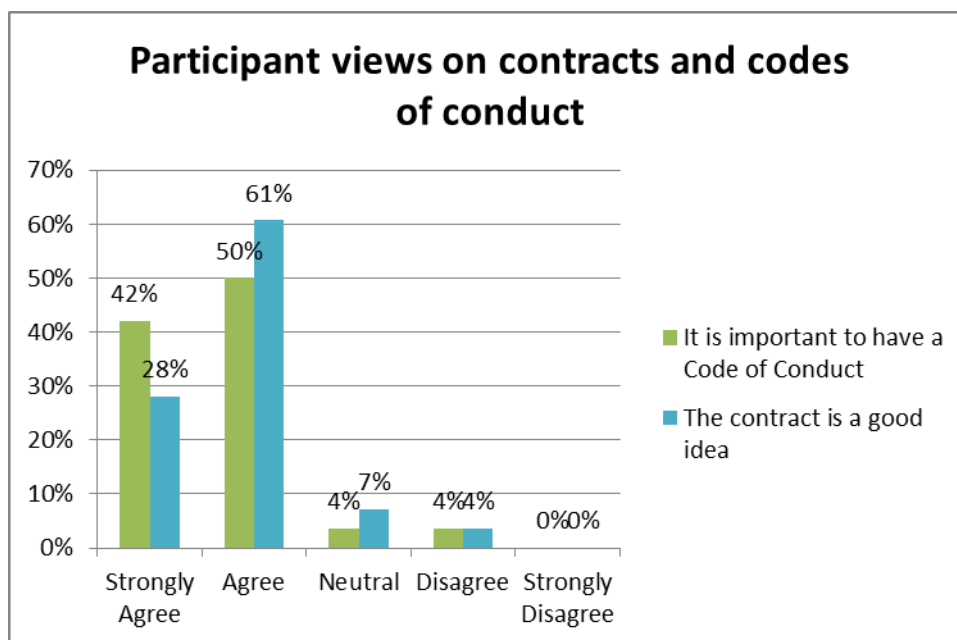
There was a strong sense that the one to one sessions were important for informed decision making with 75% strongly agreeing and 25% agreeing with the statement;

"The 1:1 sessions were useful in helping me decide which mentees/mentors I would be happy to be paired with for the remainder of the pilot."

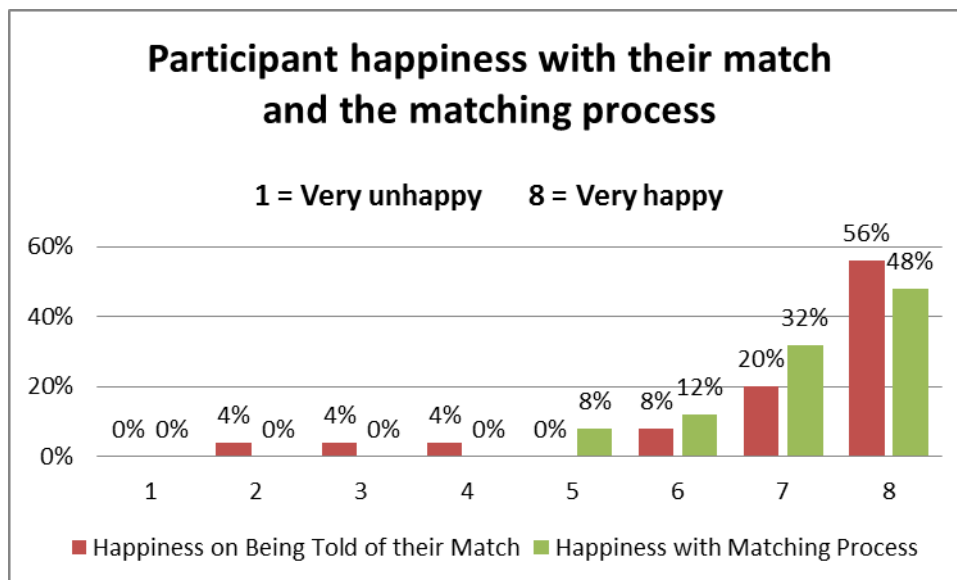
In terms of the second measure, the vast majority of participants were clear on how to proceed with their mentoring:



The combination of the 'How to Guide', the Code of Conduct and Contract is likely to have helped achieve the above result and there was certainly support amongst participants for the latter two documents:

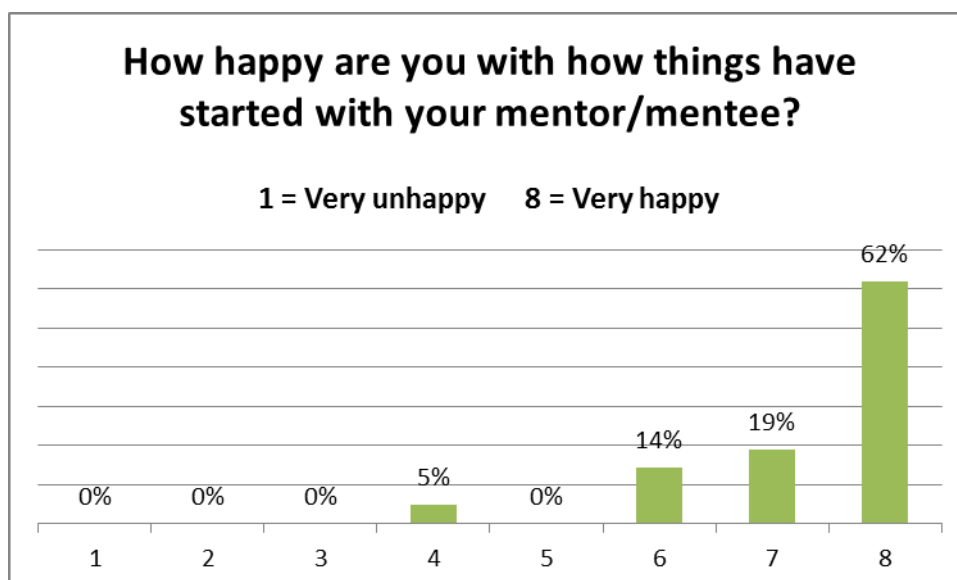


In terms of the third measure for success, participants were contacted two to three months after they had been matched to find out how happy they were with their match and the matching process. Based on an eight point scale of happiness, it was pleasing that the majority of participants had been very happy upon being told of their match. Although a small minority were (to varying degrees) unhappy upon being told, none of the 25 respondents were unhappy with the matching process:



Such a result was not entirely unexpected as over 70% of participants obtained their first or second choice. Furthermore, no one was 'unmatchable', although it came close to occurring when only one possible match existed for one participant. In *mch*'s view, a liberal amount of good fortune, in addition to design was responsible for such favourable statistics. From a learning perspective, it would have been useful to have experienced an 'unmatchable' situation, however in operational terms, *mch* was happy to have avoided such an outcome! If such a scenario had occurred, the benefit of having a waiting list of mentors and mentees would have been realised.

As many mentoring manuals testify, successful matching often leads to successful mentoring and participant views two to three months into their mentoring relationship (with all participants having had at least one face to face meeting and multiple email exchanges) suggested the IoFSW mentoring pilot was no different:



For all the above results there were no significant differences between the responses of mentors and mentees.

Participant Engagement with Respect to the Matching Process

Initial qualitative feedback in relation to the matching process was very positive and the common characteristic of all the suggestions for improving the process centred around providing 'more rather than less':

- (i) Allow more time for the 1:1 sessions (cited four times)
- (ii) Provide dedicated time between 1:1 sessions to allow mentees to reflect on whether their priorities for the mentoring relationship were changing (cited three times)
- (iii) Stress the value of using the mentoring matching grid with examples of how certain issues can impact on mentoring (cited once)
- (iv) Provide mentors with a short biography of each potential mentee (and vice versa) prior to the matching session/Complete a pre-matching questionnaire which is disseminated to all relevant participants (cited twice)
- (v) Provide a half-day training event once the matches have been made to enable mentoring pairs to look at how best they might set objectives for the coming year and to discuss the nature of the mentor/mentee relationship (cited once)
- (vi) Allow more time for mentors and mentees to discuss their concerns and thoughts on mentoring within small groups of peers (cited twice)

A further request raised during the matching session feedback (and subsequently reinforced during the mentor training and the feedback gained two to three months into the mentoring) was for further opportunities for mentors and mentees to meet with their peers on an ongoing basis.

Issues in Relation to Geography

Given the size of the South West region and its variable transport infrastructure, matching participants from different parts of the region was a risk and geographical distance was a contributing factor in the one mentoring relationship that ended prematurely. Furthermore, several participants commented on the travelling associated with mentoring sessions as being a significant challenge to their relationship's success. However some of the greatest success stories stem from mentoring relationships that managed to bridge significant geographical barriers (e.g. a mentor being based in Bath and their mentee being based in Truro). Furthermore geographical distance was beneficial to some. For example, when participants were asked what they had liked most about the pilot, one mentee stated:

"Speaking to someone who is knowledgeable and passionate about fundraising, but from another charity outside of my location. It meant that we could share contacts without the threat of competition."

Recommendations with Respect to Future Matching

In terms of the participant suggestions, *mch* believes that it is important to highlight that no suggestion carried the weight of a significant number of participants. The most popular suggestion, more one to one time, was only cited by four people (out of twenty eight). Furthermore, an equal number of participants stated the amount of one to one time was adequate in their evaluation.

However *mch* believes that suggestions (i) and (ii) do have the potential to improve the matching process and could easily be accommodated if the number of mentoring pairs at each matching session was reduced from seven to six or five. It is important to point out that such a change would:

- (i) Reduce the choice of mentors available to mentees
- (ii) Reduce the overall number of participants that could be accommodated in any given mentoring programme

Suggestion (iii) could easily be incorporated if it was considered important. It should be mentioned however that *mch* did verbally provide examples to illustrate the use of the matching grid. Furthermore, providing written examples would turn the matching grid from a one page document into a multiple page document which could prove cumbersome for participants as they move between 1:1 sessions.

mch would not object to the implementation of suggestion (iv). The only concerns it would have are:

- a. Any information relating to mentee aspirations for their mentoring may become obsolete as several mentees have commented on how their aspirations changed during the matching process
- b. Prior knowledge may lead to preconceptions (whether conscious or subconscious) having a greater influence on the matching process
- c. The administrative time required for implementation would be significant

In an ideal world, suggestion (v) would be a very good idea. In practice, *mch* believes it would be difficult to implement due to future budget constraints, the time pressures of participants and the difficulty in finding a mutually convenient date.

Suggestion (vi) was actually implemented in the pilot by providing two mentor and one mentee 'get togethers' during the mentoring phase of the pilot. While entirely voluntary, the attendance figures (eight and nine mentors attending each mentor gathering and ten mentees attending their gathering) and feedback suggested such gatherings were very valuable for participants.

In addition to the above operational suggestions, a combination of observation and participant feedback suggests the matching sessions would benefit from:

- (i) Being held later in the year

The venues were consciously selected to allow participants to go outside during their one to one sessions. Unfortunately, holding the sessions in early March meant many participants felt it was too cold to move outside (even though they wanted to do so).

(ii) Being even clearer about the matching process

Although the matching process was verbally explained to participants, some participants still seemed to be unsure about how the matches were made.

The final comment to make about the matching process relates to the importance of having a waiting list of potential participants. As already mentioned, such a list would be vital if participants were unable to be matched during a session. Such a list is also valuable in the event of a participant providing advance warning of their inability to attend their matching session (e.g. due to ill health or a family emergency). Indeed, individuals on the pilot waiting list were contacted when a selected mentee was too ill to attend the introductory session and it looked as if they would not be able to make their matching session. In the event, they managed to recover in time.

Developing Quality Mentors

Training

Action Taken

Based on *mch*'s experience a key way to develop quality mentors is through training; with the development of emotional intelligence and communication skills being particularly important. In addition to introducing the concept of emotional intelligence and outlining how it could be developed, active listening, giving and receiving feedback and differing questioning techniques were also reviewed in the pilot's mentor training. Another key component was the importance of tuning into the personality of the mentee and adapting communication techniques accordingly. Practical exercises were central to the day and every mentor had the opportunity to:

- (i) Participate in a mentoring role play (with the mentee being played by a professional actor)
- (ii) Observe and provide feedback on role plays conducted by other mentors
- (iii) Participate in a genuine coaching exercise designed to assist a mentor to achieve a personal goal
- (iv) Observe and discuss video clips outlining successful and less successful approaches to communication

Such practical exercises required significant staffing and a training team of four people was used to train the fourteen mentors. The structure of the course also meant that fourteen mentors was the maximum number that could be accommodated.

Based on experience, two to three days is the indicative amount of time that should ideally be given over to mentor training. Consequently, a pre-existing two day *mch* mentor training course was adapted and compacted for the training of IoFSW mentors. To try and keep mentors mindful of the training content over an extended period, a series of email reminders were provided in the weeks following the training. A full overview of the training session can be obtained from *mch* upon request.

The provision of training was considered important to try and ensure that all mentors had the knowledge and tool kit required for great mentoring. The need for training was illustrated by the fact that:

- Three quarters of mentors had no previous formal mentoring experience
- A third of mentors had no previous informal mentoring experience

Furthermore, mentor self-assessment showed a high degree of variance in terms of their understanding of emotional intelligence:

How would you rate your understanding of emotional intelligence prior to this training?

(1 = I had never heard of it before 8 = I had an excellent understanding)

Average Score	5.5
Maximum Score Recorded	8
Minimum Score Recorded	3
Mode	5

Results

Immediate feedback on the training was considered successful from a number of perspectives:

- (i) It was relevant
 - 73% strongly agreed and 27% agreed that the content of the training was relevant to their role as a mentor
- (ii) It was understandable
 - 18% strongly agreed and 82% agreed that the content of the training was easy to understand
- (iii) It prepared mentors for their role
 - As a result of the training 64% strongly agreed and 36% agreed that they felt better prepared for the role as a mentor
- (iv) It was considered a starting point to on-going development
 - 27% strongly agreed and 64% agreed that they planned to continue developing their emotional intelligence and/or its associated skills. 9% were neutral

mch was also pleased that over 90% of participants either strongly agreed or agreed that the training would be of use outside of mentoring. This is because *mch* wanted to position the training as a form of reward for the time and effort mentors were going to voluntarily invest in the pilot. Highlighting the broader benefits of the training was a means of doing so.

Given the cost associated with providing role plays and coaching exercises, it was pleasing that 10 of 11 evaluations received either strongly agreed or agreed that both were useful. Furthermore, of the 12 comments received in relation to particularly useful parts of the training, role plays were cited five times and the coaching exercise four times.

Feedback provided at the end of the pilot was also very positive with 69% strongly agreeing and 31% agreeing with the following statement:

"The training I received at the start of the pilot helped me in my role as a mentor"

The mentor training was also cited by several mentors when they were asked what they had liked about the pilot and how they had personally benefited from it.

Maintaining Motivation

Action Taken

In *mch*'s experience, quality begins to suffer if motivation wains, no matter how skilled the individual. Three key areas were considered in an attempt to maintain motivated mentors:

(i) Providing mentors (and mentees) with a high degree of autonomy in relation to how they went about their mentoring

(ii) Keeping expectations achievable

IoFSW and *mch* tried to keep the reporting requirements of mentors to a minimum

(iii) Making mentors feel appreciated

In addition to the delivery of high quality training, mentors were offered a free place at an IoFSW conference in recognition of their role. Furthermore, IoFSW and *mch* sent out a formal thank you to all mentors towards the end of the pilot. IoFSW also suggested to mentees that they explicitly thank their mentors. Finally, all the mentors were listed on a 'roll of honour' on the IoFSW website.

Results

Feedback from mentors showed a high level of satisfaction in relation to the expectations of their role, with 69% agreeing and 31% strongly agreeing with the statement:

"I feel what was expected of me was achievable"

Feedback in relation to feeling appreciated was even more positive, with 69% strongly agreeing and 31% agreeing with the statement:

"I feel appreciated for what I have contributed"

Participant Engagement with Respect to Developing Quality Mentors

The area of mentor training was the only one in which participants were proactively engaged at the planning stage. Specifically, after the opening session, mentors were asked to stay behind to discuss their training. Mentors were first asked whether there was any particular training they would like, or felt they needed. None had any strong views on the issue, so an outline of the proposed training was provided and discussed. In particular, the use of role plays was discussed and a consensus reached that they would be valuable.

In terms of feedback provided after the training, three key areas emerged from the eleven forms received:

- (i) Have two days of training rather than one (cited three times)
- (ii) Incorporate case studies for discussion into future training, particularly those that arise from the pilot (cited twice)
- (iii) Devote more time to personality types rather than emotional intelligence (cited once)

Subsequent feedback at a mentoring gathering offered a fourth suggestion:

- (iv) Leave more time between the email reminders associated with the training

Recommendations with Respect to Developing Quality Mentors

mch would be happy to incorporate all four participant suggestions: as stated previously the preferred amount of time for mentor training is two to three days. Doing so however would require an increase to the training element of the budget. It is also likely that participant concerns surrounding time commitments would have to be addressed. As previously detailed, half of all participants initially strongly agreed or agreed that the mandatory two to three days constituted the maximum amount of time they could commit (when asked at the opening session). Interestingly, several of the participants that answered in this way then went on to say that they wanted more time for the matching sessions and/or training sessions.

Regardless of the length of training for future programmes, *mch* believes it is important to maintain the quality of the training by ensuring that it is sufficiently staffed. In short, reducing the current four person training team would reduce the quality of the training.

Providing Sufficient Support

Action Taken

Upon completion of the matching and mentor training sessions, participants were encouraged to contact a named contact within either *mch* or IoFSW, at any point during the remainder of the pilot, if they had any issues or concerns they wanted to discuss.

Based on feedback from participants at the matching and training sessions, a total of three peer gatherings were arranged during the course of the pilot (one for mentees and two for mentors). The focus of these gatherings was so that participants could provide peer support.

Results

In the event *mch* and IoFSW were only contacted by participants four times during the course of the pilot.

The first contact was from a mentor who wanted some guidance on how to deal with a lack of contact with their mentee, due to the latter's extended absence from work. *mch*'s role in this instance was primarily one of reassurance, as the mentor's suggested approach was exemplary.

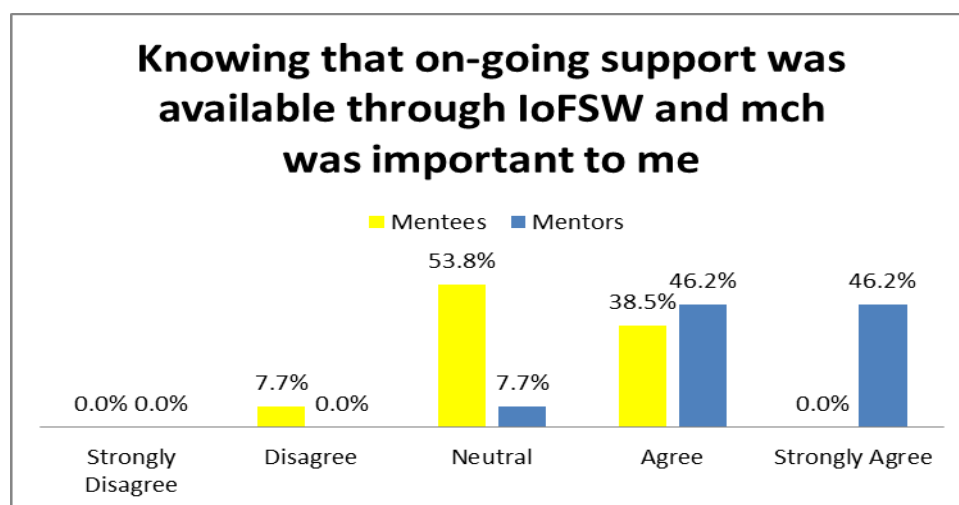
The second contact was from a mentee who had decided to resign from their fundraising role and start a new career outside the charitable sector. They wanted to know whether their mentoring could continue in light of these circumstances. Given that their mentor was happy to continue, and that the pilot had always made it clear that the focus was the life of the mentee, *mch* and IoFSW supported the continuation of this particular mentoring relationship.

The third contact was from a mentee who did not feel their relationship was developing at a sufficient rate to merit continuing. This led to *mch* having separate telephone discussions with both the mentee and mentor. Based on these discussions it was mutually agreed by all parties that the relationship should officially end.

The fourth contact was from a mentor, on behalf of their mentee, asking whether *mch* had any suggestions as to where the mentee could source training in a particular leadership skill.

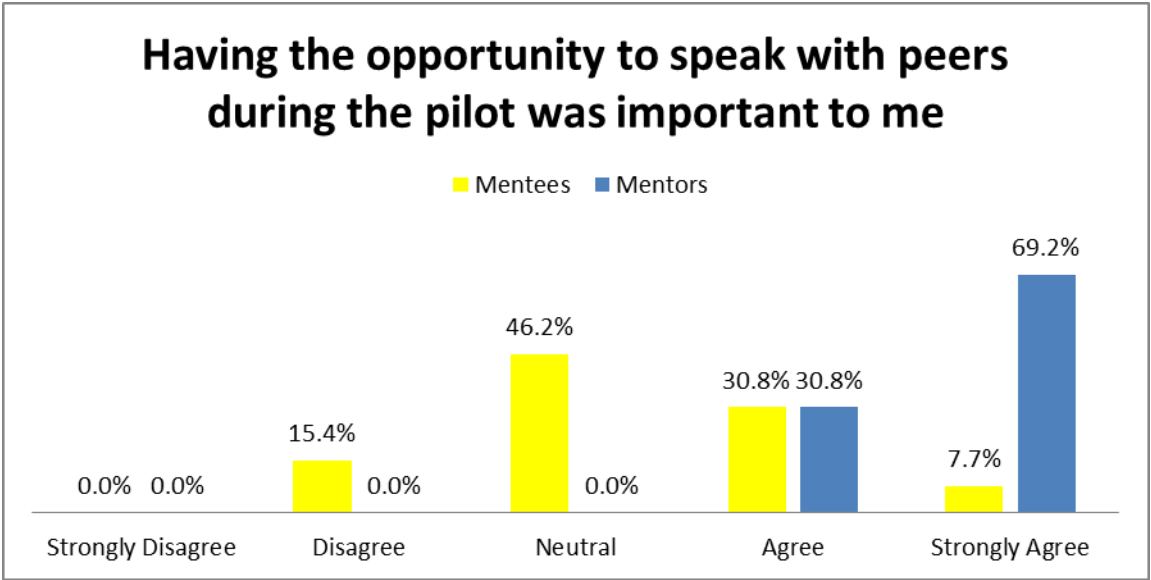
The low number of contacts suggests that if you get the recruitment, induction, matching and training phases of a mentoring programme right, then the mentoring takes care of itself.

However, even though a very small number of participants made contact with *mch*/IoFSW the fact that such support was available appeared to be important, particularly to mentors:



In *mch*'s view, it is not surprising that mentors were particularly comforted by such support being available as the dynamics of mentoring are such that they have little control over the agenda and are thus more likely to be placed on the 'back foot' with respect to issues raised. In short, if the mentee has an issue, they can go to their mentor; but who does a mentor go to if they have an issue?

While support from *mch* and *loFSW* appears to have been important, final feedback suggests that support from peers was even more so:



Ensuring a Sufficient Number of One to One Sessions

One key factor that was ultimately outside the control of *mch* and IOFSW was the number of contacts/sessions between each mentor and their mentee. Although meeting once a month was suggested as a guide, it was left up to each mentoring pair to schedule.

The methods used by mentoring pairs varied considerably as outlined in the table below:

Measure	Number of Contacts Made During the 12 Month Pilot Period by Method:					Total Contacts
	Email*	Phone Calls*	Skype Calls	Face to Face 'Catch Up' at IOFSW events	One to one, face to face meetings	
Average	13.6	5.8	0.4	0.8	6.6	27.2
Standard Deviation	10.1	4.9	1.4	1.1	2.5	12.7
Minimum	3	2	0	0	3	13
Maximum	40	20	5	3	11	60

*Only emails and phone calls where significant time was spent on issues were recorded and not those used to arrange meetings etc.

Including catch-ups at IOFSW events, the average mentoring pair met between seven to eight times during the year, with an additional 20 emails/phone calls sent and received during this period.

Given the uniformly positive feedback in relation to the success of the pilot and the high variance in the number of contacts, one could argue that mentoring can be successful irrespective of the number of sessions.

Correlation analysis however, suggests that the higher the number of contacts, the more likely participants are to 'strongly agree' that their mentoring has been successful overall, rather than just 'agree'. The correlation is particularly strong for face to face contacts:

Correlation	Correlation Coefficient
Correlation between total face to face contacts and degree to which participants feel the mentoring has been very successful	0.72
Correlation between total non-face to face contacts and success	0.37
Correlation between total contacts and success	0.50

A correlation coefficient is a number between -1 and 1 which measures the degree to which two variables are linearly related. A perfect linear relationship will give a correlation coefficient of either 1 or -1, while a correlation coefficient of 0 means that there is no linear relationship between the variables. Consequently, a value of 0.72 shows there is a relatively strong correlation between the number of face to face meetings and reporting high levels of overall success. A correlation of 0.37 shows that there is a much weaker correlation between the number of calls/emails and how positively success is reported.

Participant Views on the Determinants of Success

Although the above nine determinants of success were not shared with participants, participants cited several of them when they were asked what they had liked most about the programme:

Getting the Right Applicants

"The fact that the mentors gave their time voluntarily to make this work was very touching as their passion to pass on their skills was so sincere and genuine."

Making the Right Mentor-Mentee Matches

"Very good matching system – get it right and it is easy and natural from that point onwards."

"I thought the way mentors and mentees were matched up was perfect. I was exceedingly happy with the mentor I was allocated on all levels."

"[I liked] being able to choose who I worked/didn't work with."

Developing Great Mentors

"The training was excellent, challenging and developmental."

Delivering all aspects in an effective and positive way

"[It was] flexible enough through the programme to adjust to my mentor's availability, myself and organisation"

"I enjoyed the structure, training and being part of a new innovation."

"I think the pilot benefited from being incredibly professional and well organised. To be frank, I signed on with a slight sense of caution but quickly realised the programme was well planned and thought through and, as a group, we were embarking on something that was going to have a lasting value for the profession."

The importance of the determinants is perhaps also shown by participant responses to;

"What didn't you like about the pilot?"

Nine of the thirteen mentees stated; "Nothing", suggesting that focusing on the key determinants minimised dissatisfaction.

In terms of those that did have dislikes, the volume of paperwork at the beginning of the pilot and a lack of clarity in relation to selecting mentors were stated. Hopefully, implementation of some of the previously outlined recommendations will address such issues in the future.

A telling response made by one mentee when asked about dislikes was:

"I moved job after signing up to the pilot and so felt that my needs were very different from those that I had expressed when I first filled in the application form. For this, I felt that I almost let my mentor down by being in a more stable and supported role in my new job."

Such a comment outlines how quickly circumstances can change. However, the key issue that strikes *mch* about this comment is the implication that mentoring is only for the bad times and is not as important/useful when things are more stable. *mch* would argue that mentoring can be just as valuable in good times as bad. Consequently, while *mch* maintains applicants should still be prioritised partly on need/development issues, it believes that mentoring's value, regardless of circumstances, should be better communicated.

Five of the mentors also stated 'Nothing' when asked about dislikes. Specific dislikes cited have all been covered in the participant engagement sections of the determinants analysis above.

Themes to Emerge from Qualitative Feedback

Specific pieces of qualitative feedback have been inserted at appropriate points throughout this evaluation. This section summarises some of the broader issues that emerged when participants were asked the following questions:

"What did you like most about the pilot and why?"

"What do you consider to be your mentoring relationship's greatest achievements to date?"

"What's been the biggest benefit to you from being mentored/a mentor?"

"What were the greatest tests to your mentoring relationship?"

Feedback Relating to Likes, Benefits and Achievements

Mentee Feedback

As already indicated, many mentees achieved tangible and intangible benefits from being mentored, both for themselves and their organisations. In addition to these areas, many mentees commented on how much they liked or benefited from the following underpinning characteristics of mentoring:

Scope

"I liked the programme's acceptance that personal development was as important as career/work development."

Reflection

"I very much enjoyed the speed dating day [matching session]... it was on this day that I asked myself the most profound questions and communicate[d] who I was and what I wanted to complete strangers."

Independent Support

"I liked being able to have on-hand advice from someone more experienced than me. It was also good to have someone outside my employer to discuss things with."

A Differing Perspective

"It gave me the opportunity to see how another charity worked."

A Genuinely Supportive Relationship

"I benefited from guidance and reassurance from an individual who is successful in their chosen field. A great confidence builder!"

"I felt validated in my instincts and actions and this has been very helpful during a tumultuous year where an independent opinion has been really helpful."

Mentor Feedback

Like mentees, many mentors commented on how much they liked or benefited from underpinning characteristics of mentoring. The most commonly cited was the giving of themselves with no expectation of anything in return:

"It was so rewarding being able to share the benefit of 25 years experience with an emerging fundraiser and to see that the skills were still relevant and made a difference. Great to watch the confidence grow and realise I was less needed!"

"I have enjoyed seeing my mentee grow in knowledge and confidence. I am looking forward to keeping in contact to see where the next chapter of her life takes her."

"It met a clear need to provide support to lone and newer fundraisers and I have been so impressed by the commitment of the Mentors and the impact of the project."

Other likes/benefits that were repeatedly mentioned were:

- (i) The development of relationships with fellow mentors

And to a lesser extent:

- (ii) The mentor training that was provided

Mutual learning, a sense of recognition and an improved knowledge of mentoring were also cited:

Mutual Learning

"[I benefited from] learning from my mentee!"

Recognition

"[I benefited from] the recognition of my skills and ability as a mentor, and the opportunity to share knowledge in order to benefit a young fundraiser, and the sector as a whole"

Scope

"I feel that I now understand 'mentoring' as opposed to the rather vague notion I held previously."

One of the most positive responses provided an overarching summary of many of the other mentor comments:

"I liked feeling inspired, learning, sharing knowledge and being able to empower."

Challenges Faced by Participants

Mentee Feedback

The most common challenge, cited by five mentees, was making time for mentoring. In several cases, this led to a sense of guilt:

"I had a patch where I felt unreliable due to very heavy work commitments and felt guilty for not giving my mentoring relationship a higher priority in this period."

Interestingly, the next most commonly cited response (three mentees) was that no significant challenges had been faced.

Other challenges, all of which were cited once, included:

"The wide variation of my role sometimes made it difficult to effectively prepare and stick to set areas of development. Became quite *ad hoc*!"

"Communicating personal situations that may be affecting my work."

"Lack of response from my director and trustees."

Such statements capture many of the practical issues faced by mentoring relationships. Given how quickly personal situations change, there is often a constant requirement to examine whether last month's priorities are still relevant this month. Since mentoring is about the life of the mentee, there is often a challenge in finding out enough about a mentee's personal circumstances so that the most appropriate help can be provided in relation to work issues. Finally, for all its benefits, mentoring is not a panacea for all ills and there is only so much it can do: if trustees and directors do not share a mentee's goals and aspirations then 'roadblocks' to progress are likely to remain.

Mentor Feedback

A lack of time (cited five times) and the travel associated with the mentoring (cited twice) were the only two challenges cited more than once.

Other challenges centred on either:

Fundamental challenges associated with being a mentor

"Initially, I felt my mentee's needs were outside my comfort zone. However, we both eased into the relationship and found our feet."

"Resisting the temptation to get more involved!"

"Ensuring I was prepared."

"Trying hard not to tell someone how to do things! But to encourage them to find their own solution."

"Being honest."

Or:

Specific situations facing the mentee

"The question of should a fundraiser receive a bonus attached to a target."

"The financial circumstances of the charity which could have resulted in early redundancy for my mentee."

Proposed Model for Future Mentoring Programmes/Considerations for Sustainability

Based on this evaluation the pilot has been successful across multiple measures. Furthermore, the evaluation strongly suggests that the pilot model used played a significant part in delivering such success. Consequently, while many recommendations have been put forward to iterate the current model, none involve wholesale changes.

However, given IoFSW's typical income and expenditure, the costs associated with external consultancy support have to be reduced for future mentoring programmes to be sustainable.

Fortunately, future programmes will not incur significant development costs as the existing processes and sessions (and associated paperwork) can be largely reused. Furthermore, if it is felt that this evaluation provides sufficiently compelling evidence for the need and value of mentoring, then a case could be made to reduce the level of future evaluations. Specifically, participants could simply complete the existing evaluation forms after all the key sessions. If:

- (i) The feedback provided is as positive as that received during the pilot
- (ii) The existing model is followed sufficiently closely
- (iii) The number of mentoring relationships that end prematurely is very low (i.e. only one or two from a sample of around 14)

then the value of mentoring delivered in future programmes could be assumed to be comparable to that exhibited in the pilot.

Delivering as many compulsory sessions as possible by IoFSW committee members is likely to have the biggest impact in reducing costs. Given the content, *mch* considers that both the introductory session and the matching sessions could be delivered by individuals without in-depth training experience or specialist knowledge of mentoring. Fortunately, five members of the IoFSW committee gained significant insights into the delivery of these sessions, either by participating or observing. If these individuals are prepared to volunteer their time for future projects, external staffing costs could be limited to mentor training delivery. This could reduce external costs from £16,650 to around £1,500 – 2,000.

To ensure the longer term sustainability of the programme, *mch* considers that it is essential for IoFSW to maintain a pool of four to five volunteers that are prepared to handle the administration, deliver the sessions, organise peer gatherings and conduct the core evaluation work.

The other significant costs relate to venue hire and food and drink. Continuing to select venues where IoFSW can provide its own catering is one option for keeping such costs down. Not providing free lunches would be another option. This policy was implemented in a recent mentoring pilot delivered by Fundraising Ireland (which *mch* assisted with) and the vast majority of participants did not seem to mind. Such measures could reduce the total cost to £3,000-4,000.

In addition to minimising costs, the other key option to consider is charging for the privilege of participating in the mentoring programme. When pilot mentors were asked whether future mentors should pay to participate, only one of the 13 answered 'Yes'. Ten answered 'No' and two were 'Not Sure'. A slightly higher proportion of mentees thought future mentees should pay, with three answering 'Yes', two answering 'Not Sure' and eight answering 'No'. Those that answered 'Yes' or 'Not Sure' were asked to provide an amount that they felt would be reasonable. The following suggestions were made:

- £75-175 (based on turnover of organisation)
- £50 (cited twice)
- £25-45

The following comments were also made:

"This is a very philosophical question.... We are entering a world where the VCS [Voluntary and Community Sector] has to become business like (recognising the monetary value of services/training). On the other hand the programme already has a cost implication for organisations, significant travel costs and time out of the office, many small organisations might be put off. The IoF could consider a charge with a generous bursary scheme?"

"Ideally I would say however much it took to cover the training sessions. I think £50 per person would be a good all-round figure but I imagine that is less than it costs to run the whole pilot. With my business hat on I just feel that the pilot has to be sustainable because it is so valuable that I wouldn't want it to end due to lack of funding. Perhaps you could have a tiered payment scheme? I'm sure some fundraisers might be prepared to pay more for this service."

In relative terms, the six employers of mentees contacted were the most amenable to paying a fee with two answering 'No', three answering 'Not Sure' and one answering 'Yes'.

Both the pilot delivered by Fundraising Ireland and the planned pilot for IoF(London) involved mentees paying an administration fee of 50 euro/£45 to contribute to programme costs. Interestingly, neither struggled to obtain sufficient mentees for their programmes. Given the experience of Fundraising Ireland and IoF(London), *mch* would recommend charging mentees at least £50 to participate. Furthermore, it would recommend analysing how much it would have to charge mentees in order to 'break-even'. It should then communicate this amount to participants so that they are aware of the programme's true financial cost from the outset. Such marketing could help with recruitment, as mentees and their organisations would see what a bargain they were getting. Crucially though, making the true cost common knowledge from the outset, could make any subsequent price rises more palatable.

Appendix One: Statistical Significance/Sample Size Formulae

Three considerations dictate sample size

- How confident we need to be that the estimate is accurate (level of confidence)
- How accurate the estimate needs to be (margin of error tolerable)
- Proportion of responses we expect to have some particular attribute*

*If the proportion (e.g. % agree) can't be determined in advance, a conservative approach is to estimate a 50/50 split

Minimum sample size formula**

$$n = \frac{p \cdot q \cdot (z/e)^2}{}$$

** 'Research Methods for Business Students', 1999.

n is the minimum sample size required

p% is the proportion belonging to the specified category

q% is the proportion not belonging to the specified category

z is the value corresponding to the level of confidence required***

e% is the margin of error tolerable

*** z=1.65 for 90% certainty, 1.96 for 95% certainty and 2.57 for 99% certainty

Standard Inputs

p	50%
q	50%
z	1.65
e	10%

Standard Outputs

n	68.0625
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When the population is less than 10,000, the minimum sample size can be reduced without affecting the accuracy

$$n_r = \frac{n}{1 + (n/N)}$$

Where

n_r is the adjusted minimum sample size

n is the minimum sample size

N is the total population

Appendix Two – Selected Resources Outlining the Key Ingredients for Successful Mentoring Programmes

There are many 'How to' guides which provide insights into mentoring programmes and developing successful mentoring relationships. These include:

- Mentor (US Based Organisation) (<http://www.mentoring.org>)
The following resources from the 'Elements of Effective Practice' section of the organisation's website provide useful guidance on specific issues:
 - Mentoring Essentials: Risk Management for Mentoring Programs
 - Building Relationships: A Guide for New Mentors
 - Guide to Help Prepare Participants for Mentoring
 - Learn to Mentor Toolkit
 - Avoiding Early Match Termination
 - Creating and Sustaining a Winning Match
 - Supporting Mentors
 - Mentoring Relationships: Seven Tips for Coming to Closure
- The Mentoring and Befriending Foundation (<http://www.mandbf.org.uk/resources/>)
The following resource provides a high level overview of mentoring:
 - A synthesis of published research on mentoring and befriending

The foundation also has an extensive list of links to resources focusing on particular aspects of mentoring. Furthermore, the foundation has a number of purchasable resources such as 'Training for Mentoring and Befriending Volunteers – A Resource Pack'

Appendix Three – Employer Commitment Form



Institute of Fundraising South West Mentoring Programme Pilot 2010/11

Employer Commitment Form

This is to certify that I [Your Name]
Name]

have management responsibility for [Applicant's

If [Applicant's Name] is offered a place on the 2010/11 Institute of Fundraising South West mentoring programme I will, on behalf of the organisation, endeavour to support their participation in the programme.

In practical terms, I understand that this will mean allowing them to attend several training and information events during March 2010 and allowing four hours of work time per month to be spent on their mentoring relationship between April 2010 and March 2011.

In addition to these practical commitments, I will also endeavour to consider their participation in the programme as a high priority in terms of their overarching work commitments.

Signature:

Position within Organisation:

Date: