

Qualification:

**CIPD Diploma in Applied Human Resources**

Module Name:

**Contributing to Coaching and Mentoring in the Workplace**

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Student Number: 1403228

CIPD Membership Number: 49777067

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: 

Kate Houston

Date: 17<sup>th</sup> April 2020

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**Candidate declaration:**

- I confirm that the work/evidence presented for assessment is my own unaided work.
- I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action.
- I agree to this work being subjected to scrutiny by textual analysis software if required.
- I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998.
- I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records.
- I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.

**Signature:**



**Date:**

**17<sup>th</sup> April 2020**

## 1.1

### **Investigate the extent to which coaching and mentoring take place within an organisation.**

Coaching and mentoring at Ateb have been limited with very little formal mentoring and coaching. I spoke to a small selection of employees in order to obtain qualitative data to understand employees' views on coaching and mentoring now and in the future.

Previously, I have utilised Survey Monkey to collect such data however, I wanted to speak to the individuals' regarding each question hence I held one-to-one conversations initially, re-affirming our conversation by a standard email asking them to answer each of the questions independently gauging how widespread coaching and mentoring was at Ateb, employees perceptions and desires (EV. 1).

Ateb have no policies and procedures relating to coaching and mentoring in the workplace however, over the last three years Ateb has been re-evaluating its culture by addressing its hierarchical structure. The initial stage created new strategic aims, values and DNA (EV. 2) to begin to establish a culture-ready organisation, one which in the future will demonstrate a predominant coaching style. Clutterbuck and Megginson (2016) reflect once this style of management is embedded growth will occur for the organisation and its people.

Over the last few months team leaders, supervisors and managers were selected for OPSIS training which is consultant-led. The training focused on encouraging a culture change at Ateb hence the need to re-evaluate mind-sets and behaviours required to reflect an agile workplace. Coaching elements were touched on in the training, something which was missing at Ateb. Much of the focus has been on reflectivity; knowledge sharing, improving skills and professional growth. This was achieved via group participation, building working relationships between this group which is intended to be replicated top-down to their teams. Lord et al (2008) reflect a collaborative learning culture should be encouraged (EV .3, EV. 4, EV. 5).

CIPD (2019) cite coaching is usually through day-to-day activities. Ateb is encouraging team leaders, supervisors and managers to coach their teams using feedback via the Achieve Framework (AF) by having regular one-to-one conversations, to clarify objectives using SMART objectives in order to achieve individual and organisational goals. This is a proactive approach emphasising coaching within the workplace thus encouraging a coaching culture. CIMA (2008) cite this produces better team commitment, better communications and promotes organisational culture (EV .5).

Ateb has only one trained coach, the People & Communication Manager and her skills have been utilised sporadically throughout her employment with Ateb. Coaching skills have not been maintained via continuous training. To date coaching has been mainly same-sector, peer-to-peer relating to performance and job outcomes whereby a colleague on similar management level has required intervention and self-improvement to improve performance. Indeed, CIPD (2019) reflects coaching is non-directive focussing on goals and task building an employee's confidence and social interaction. Megginson and Clutterbuck (2005) state goals are set by the coachee with the coach leading the process (EV .4).

The People & Communication Manager has mentored a young person outside the housing sector imparting her own knowledge to a lesser experienced mentee to develop their personal growth via CIPD Steps Ahead Campaign for the young person to sustain employment. This was an example of mutual learning and partnership between two people (EV. 4).

Both my colleague and I have completed a University of Wales Trinity Saint David's, Mentoring in the Workplace qualification (EV. 6) which included an observed session providing mentoring in the workplace. As a direct result from attending this course, we offer a hybrid mentoring scheme to new recruits via colleague mentoring. This to date has been sporadic, as new recruits are reluctant to want to self-improve in this way rather informal mentoring learning on the job in their teams via colleagues (EV. 7).

This year's chosen charity is Get A Boys A Lift which promotes improving mental health awareness in the community. Ateb collaboratively works with the charity offering housing, welfare benefits and recruitment advice via drop-in sessions held every first Wednesday of the month at their premises. This has been an opportunity to mentor individuals from finding a job; how to apply, basic curriculum vitae writing and interview techniques (EV. 8, EV. 9).

## **1.2**

### **Evaluate how current coaching and mentoring activity supports achievement of individual, team and organisational objectives.**

Connor (2018) reflect to remain competitive organisations are required to build a coaching culture; this benefit both the individual and the organisation.

It is noted that hierarchical structures demonstrate silo cultures, this was the case for Ateb, historically it exhibited a process-driven and was averse to accepting and providing feedback (Sharp, 2018). To alleviate this team leaders, supervisors and managers were selected for OPSIS training covering a wide remit. Attendees were tasked with imparting their knowledge to their teams empowering them to decision-make, problem solve whilst allowing their teams and Ateb to grow using techniques and tools acquired from these sessions. Strategies utilised were active listening, the use of probing questioning, role modelling to improve understanding across the Group and the use of constructive feedback together with holding difficult conversations. In doing so, these sessions followed the AF identifying individual, team and organisational objectives thus linked to Ateb's purpose, strategy and culture; this is a good building block to execute coaching and mentoring in the future (EV. 10, EV. 3, EV. 4, EV. 5).

My colleague and I offer new recruits an opportunity to be mentored throughout their six probationary period, sending an email in the first instance (EV. 11). The new recruits usually do not want any assistance only later into the probationary period when performance issues have arisen. At this point, I ensure I discuss their Role Profile, ensuring they understand their duties and how these relate to the department's Service Areas. Many employees do

not understand Service Areas are corporate departmental objectives and how they contribute to these objectives (EV. 12).

### 1.3

#### **Assess factors in the organisation including other learning strategies which could impact on the further development of coaching and mentoring.**

Ateb is vastly growing offering new job creations over the last year and this is expected to continue in 2020. An emphasis has been placed on encouraging investment of training and development with a new Passport to Work Scheme being explored in 2020/2021 linking Role Profiles to learning requirements. The budget for training and development is stagnate therefore introducing coaching could see personal development increase assisting with areas like skills gaps and career succession. There is a wealth of experience and different levels of management styles that could support coaching (EV. 13, EV. 16).

Moving forward to 2020/2021 Management Team have set a target that all employees will be using the AF (manager/supervisor and employee review which focusses on individual, team and organisational objectives) by April and occurrence will be at least once every quarter as best practice. Management team have expressed that tools and techniques modelled at OPSIS be displayed within the AF such as elements of coaching. Due to workload pressure and an audit in March 2020 the AF will be pushed back later in the year, when it will be rolled out focussing on the recommendations of the auditor's report (EV. 4 Tori).

I envisage coaching occurring daily in the form of constructive feedback, probing questions and active listening these behaviours role modelled and utilised within the AF will lead to collaboration and knowledge sharing in the form of cross-sector mentoring partnerships with other housing sectors; increasing skills levels and career progression throughout the sector. This would impact on Ateb's culture reinforcing a learning, reflective and collaborative culture that will assist with recruiting and retaining talent with no additional costs involved. Coaching and mentoring can take place either face to face or using technology such as Skype or MS Teams (EV. 14)

If formal mentoring and coaching were to occur factors needing to be considered would be; the matching process, the training and support required, the monetary investment, who will become mentors and mentees and who will become coaches and coachees and the impact on workload are identified before executing a formal coaching and mentoring programme (CIMA, 2008; Merrick, 2019). Furthermore, a structured approach to reflect on practices needs to be developed: this should include opportunities to discuss coaching; supervision; to ensure quality assurance; to build skills and include the importance of confidentiality as trust is paramount in the relationship (CIPD, 2019).

Due to high costs associated with external coaching internal coaching may be more beneficial. Investment will follow as more coaching and mentoring occurs at Ateb.

Coaching qualifications should be explored for key employees; team leaders, supervisors and managers wishing to invest in a formal programme. ILM offer coaching and mentoring qualifications; Level 2 and 3 are aimed at team leaders and first line managers, Level 5 is for managers with coaching and mentoring responsibilities. An advantage is that those coaching will understand Ateb's culture, DNA, purpose and norms. Albeit (Angle, 2018) cite that time pressures can be problematic, confidentiality issues and sharing of ideas may be prevalent.

My colleague Joanne Thomas, People Advisor recently revamped the induction process to include a more formal process. This involves supervisors providing a more robust 6-month supervision throughout probationary-periods, regular AF one-to-ones to discuss happiness and performance as well as a workplace buddy system outside of their team offering support. This will ensure employees are regularly having AF one-to-ones something which is currently absent, as well as, giving the workplace buddies opportunities to mentor or coach the new recruits with the aid and support from the People Team (EV. 15).

#### **1.4**

#### **Make justified recommendations for how coaching and mentoring activity can be developed to benefit the organisation.**

The main challenge relating to mentoring and coaching and one of the reasons why Ateb have not been encouraging coaching and mentoring to date is lack of understanding, workload pressures, demanding time from proposed mentors or coaches, suitable training provision and organisational support and strategic planning (Lord et al, 2008). I derived this by speaking with a small number of colleagues across Ateb ascertaining whether coaching and mentoring exists, who had a desire to coach or mentor and those who would wish to access this. I summarised this information (EV. 1, EV. 16).

There are many recommendations which could be implemented at Ateb due to no formal practices and norms currently in place. The challenge, therefore, is to start to introduce these to Ateb raising awareness and gaining interest, in the first instance. With no formal strategy or resources, the focus must be on the AF (EV. 10). This will build awareness across Ateb on coaching and mentoring techniques which can be used during one-to-one sessions, as well as the newly devised Onboarding Programme (EV. 15) utilising mentors and workplace buddies starting to develop a platform where those interested in coaching or mentoring or being coached or mentored can self-help, in the first instance.

Based on Ateb's current position and via my SurveyMonkey results I have compiled several recommendations (EV. 17) to address which I emailed to my Manager for her consideration (EV. 18) from this I took two recommendations to action (EV. 19).

#### **2.1 Promote the benefits of coaching/mentoring within the organisation recognising and addressing the potential barriers**

In light of the recommendations, it was important to promote coaching and mentoring

therefore, I designed a benefits and barriers poster which could be circulated on social media platforms within Ateb and be uploaded on the SharePoint page (EV. 20, EV. 21). This would encourage communication and be a simple checklist ascertaining the benefits and barriers for both.

Furthermore, to promote the benefits of coaching and mentoring I compiled success stories document (EV. 22). These were simple extracts from employees who have accessed coaching and mentoring at Ateb, as more people become coached or mentored or even when more employees become coaches and mentors I will add these extracts to the success stories page regularly communicating this via Yammer and the SharePoint page to encourage better take-up.

As not every employee regularly uses SharePoint and Yammer, I sourced posters to display around the office; from the kitchen, hallways to the staff meeting rooms. This I hope will encourage better take-up especially after OPSIS training with team leaders, supervisors and managers (EV. 23).

## **2.2 Contribute to the development of organisational coaching/mentoring processes.**

Previous to the appointment of the new Chief Executive, a traditional hierarchical structure was evident, great effort has been placed on encouraging a high trust environment aiming for all employees to take ownership for their job roles, to engage in continuous feedback and to decision make. It is envisaged, over time, elements of coaching will develop throughout Ateb via the AF (EV. 10) . Coaching is described as unlocking a person's potential maximising their performance (Croner-I, ND). Therefore, team leaders, supervisors and managers are effectively coaching as they demonstrate this through the AF and their day-to-day interactions with their teams (EV.3, EV. 4, EV. 5).

Following my action plan (EV. 19) to deliver a one stop place for sharing resources for coaching and mentoring I developed a SharePoint page. SharePoint is a great way of sharing a wide range of information and techniques encouraging a greater formal opportunity for coaching and mentoring in the future (EV. 24). I identified a list of valuable website links which could provide guidance on coaching and mentoring (EV. 25).

To gauge whether employees would be interested in becoming coaches or mentors in the future I discussed with a small selection of employees whether they feel they had the skills and experience to mentor or coach. At the same time, I asked whether employees would be willing to be coached or mentored. This has not a strategic aim but as Ateb grows and changes are embedded delivering a coaching culture this is likely to be evident. As this was not something which could be achieved now, I clearly stated this was to assist with my University studies. The employees were handpicked, and an email was sent asking for clarification after my discussion (EV. 1), (EV. 16).

As no formal policies or procedures are in place, I drafted a process for mentoring: employees could sign up as coaches and mentors; and employees could select themselves to be coached and mentored which would be administrated by the HR team (EV. 26).

### **2.3 Support coaches/mentors to build and develop the knowledge, skills and behaviours required for the role.**

I support team leaders, supervisors and managers in a variety of ways from addressing difficult challenges, through changing a job role, towards work-related goals, time management or delivering change initiatives by encouraging a coaching ethos. I have begun to signpost them to the resources and guidance material on SharePoint for quick reference purposes to develop their knowledge and skills. Documents I have uploaded range from: mentoring contract (EV. 27); mentoring action plan (EV. 28); principles of time management (EV. 29); how to give and receive feedback (EV. 30); recognising contributions (EV.31); reflection timesheet (EV. 32); eight stage coaching model – route map (EV.33); eight stage model (EV. 34) to active listening; powerful questions; ethical guidelines such as confidentiality. I have also included models such as GROW, OSCAR and Gibb's to support coaches and mentors should they wish to initiate a formal approach.

I provide advice on how to tackle situations, I often refer to the OSCAR model as I feel it lends itself to most situations. Coaches can use this model to detail the desired outcome, look at the current situation, list the choices available to move towards this goal which leads on to the actions and steps required to achieve the goal and finally reviewing progress to date (EV. 35).

It is important coaches and mentors build trust in the relationship therefore I remind team leaders, supervisors and managers when providing advice on how to conduct an AF one-to-one like to be personable and connecting by asking the employee "how is it going" or "how was their weekend". Coaching requires self-awareness, I often remind coaches how they should behave and communicate in one-to-ones from not to interrupting, paraphrasing, mirroring, summarising to clarify, the use of reflective and empathic listening (EV. 36).

Team leaders and supervisors have until recently not approved annual leave for their teams, dealt with difficult conversations or dealt with performance issues instead this was led by their manager. Due to the major changes within Ateb, this is something they are now asked to do; therefore, many do not have the correct behaviours or skills. I directly supported a supervisor, who herself had not had an AF with her own manager understand the process from how to conduct continuous feedback, how it is linked to the Role Profile and how this can assist with performance management. I attached powerful questions to assist in delivering the AF and signposted the supervisor to the SharePoint page for further self-help (EV. 37).

### **2.4 Assist potential coachees/mentees to understand and participate fully in coaching/mentoring programmes.**

I assist potential coachees and mentors by ensuring they understand what the difference is between coaching and mentoring approaches. Where possible I try to encourage new starters to enrol in mentoring during their probation-period (EV. 11), this is usually led by the HR Team. I have led on a small-scale mentoring to employees in the hope they will

continue with a more formal approach in the future (EV. 38). With the newly devised Onboarding Programme mentoring can occur via their workplace buddy or a fellow colleague within their team. For longer-term employees, if required I will offer to mentor them informally, this is usually to build confidence and self-esteem (EV.39).

Since I have created the SharePoint page I signpost potential coachees and mentors to this, as it has several useful resources. I discuss success stories and encourage two-way communication, as this is particularly difficult when you are new to an organisation or lack confidence.

Recently, a relatively new employee found they felt out of depth and visual upset. I used the Gibb's model to mentor the employee and seek clarification and encouragement from our conversation (EV. 40). I then used Gibb's model to reflect on my own performance for self-reflection to improve my future approach in similar situations (EV. 41). Following my session with the employee I encouraged her to discuss her concerns with her supervisor and potentially asked to be mentored. As this can be daunting, I directed the employee to the SharePoint page as there is a tip sheet for the mentee to strike up conversation as an ice breaker, it is hoped this will build a meaningful relationship (EV. 42).

## **2.5 Support the on-going evaluation and continuous improvement of the coaching/mentoring programmes.**

Coaching and mentoring as a formal mentoring programme has to date not been embedded. The AF is introducing a coaching ethos with team leaders, supervisors and managers beginning to demonstrate their soft skills they have acquired through OPSIS training like communication and probing questions. Once the AF has been launched and embedded over several months Ateb can begin to measure how team leaders, supervisors and managers believe they coach and how employees believe they are being coached through the Framework. This will be implemented in 2020/2021. Presently, the audit will endeavour to measure the AF and formulate recommendations. Due to the Coronavirus 19 situation this is on hold (EV. 4).

Measurements in the future can be gathered in a variety of ways from face-to-face interviews utilising surveys to gauge behavioural change and attitudes (ies, ND).

Surveys can be designed inputting a rating scale illustrating whether behavioural change is perceived negatively or positively. Attitude surveys could be used to address whether soft-skills like communication is evident in team leaders, supervisors and managers approach.

The new onboarding programme which has replaced our induction process has so far been measured by face-to-face interviews. As this is in its early infancy my colleague Joanne Thomas has undertaken both interviews as she designed the Onboarding Programme. Results summarised: overall the two employees liked it, they thought the buddy scheme was a good idea becoming friends with their buddies; appointments across departments to

reduce silos and to ensure new recruits have a good overall knowledge of Ateb has worked well; both employees identified future attendance of i2i (employee engagement forum) and e2i (tenant engagement) meetings would be good idea to encourage engagement. Face-to-face interviews will continue until the Onboarding Programme is established.

New recruits and employees changing their job roles are offered mentoring within the six-month probation on a volunteer basis only (EV. 12). To ensure these sessions have been beneficial to the employee I devised an evaluation questionnaire (EV. 43) sent on completion of the mentoring process. So far this year, four employees undertook mentoring directly with me. I have provided a sample of the evaluation questionnaire completed (EV. 44) and summarised the overall results (EV. 45).

**From:** [Antony James](#)  
**To:** [Kate Houston](#)  
**Subject:** RE: Coaching and mentoring  
**Date:** 12 March 2020 16:52:56  
**Attachments:** [image001.png](#)  
[image002.png](#)

Sorry for the delay Kate, I hope this helps.

**Antony James**  
**Maintenance and Compliance Manager**



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhowch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

**From:** Kate Houston <[Kate.Houston@atebgroup.co.uk](mailto:Kate.Houston@atebgroup.co.uk)>

**Sent:** 02 March 2020 13:21

**Subject:** Coaching and mentoring

Further to our conversation relating to mentoring and coaching please will you take the time to answer the points below so that I am able to consider whether the culture at ateb supports a coaching and mentoring ethos. This is for academic purposes only to assist in my studies:-

**To assist in answering the questions I have provided definitions of both mentoring and coaching:-**

*Mentoring is a mutuality of learning via a partnership between two people; the mentor has experience sharing knowledge with the less experienced mentee developing their personal or professional growth usually over a prolonged time.*

*Coaching is more a non-directive form of development focusing on specific goals, tasks and skills building an individuals' confidence, performance and social interaction at work lasting as long as needed to achieve the relevant competency. Effective coaching relates to emotional intelligence building confidence and self-awareness.*

- **Have you been mentored or coached whilst at ateb?**  
 No formal coaching and mentoring training, such as L&D awards, whilst at ateb though one of the Opsis modules was based around coaching as a style of leadership. My line

manager often uses this approach.

- **How was this established?**

Opsis – mandatory training. Line manager – ad-hoc.

- **If not, has formal mentoring or coaching been offered?**

Not in the sense that I understand formal C&M training to be. I have completed some L&D awards in previous employment, such as the A1 award which is around assessing candidates but did touch on C&M.

- **Would you access this? If not, why not?**

Depending on workload, yes.

- **Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**

I may be lacking in patience due to other work demands but I do have a great deal of experience in managing change, project management, first line management, being self-employed, teaching and assessing adults which may be useful.

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

I think I would feel more confident if I had undergone a formal C&M award but due to current workload I would fear that I would not be able to allocate enough time into doing a good job in coaching.

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

Yes but that would depend on the programme and who was delivering the training.

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

That is the intention but I'm sure that across the Group there will be mixed results. For example, I have one member of team that wants to be coached and wants more responsibility in decision making. I also have people that find it difficult to make decisions as they have not worked in that way before and find it quite alien. I have questioned and stopped myself applying old habits in 'jumping in' and taking the lead on certain issues. This has garnered mixed results but nevertheless I have felt good about empowering or even providing an unwelcomed empowerment opportunity. Sometimes I do feel that I do not have enough time to put in to helping my staff to develop and grow as first line managers, which I know that if I did it would help in developing my own C&M skills.

**From:** [Jane Robinson](#)  
**To:** [Kate Houston](#)  
**Subject:** FW: Coaching and mentoring  
**Date:** 02 March 2020 15:21:15

---

Hi Kate

Please see below. Hope it helps!

Many thanks

Jane

**Jane Robinson**  
**Customer Support Manager**



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---

**From:** Kate Houston <[Kate.Houston@atebgroup.co.uk](mailto:Kate.Houston@atebgroup.co.uk)>  
**Sent:** 02 March 2020 13:21  
**Subject:** Coaching and mentoring

Further to our conversation relating to mentoring and coaching please will you take the time to answer the points below so that I am able to consider whether the culture at ateb supports a coaching and mentoring ethos. This is for academic purposes only to assist in my studies:-

**To assist in answering the questions I have provided definitions of both mentoring and coaching:-**

*Mentoring is a mutuality of learning via a partnership between two people; the mentor has*

*experience sharing knowledge with the less experienced mentee developing their personal or professional growth usually over a prolonged time.*

*Coaching is more a non-directive form of development focusing on specific goals, tasks and skills building an individuals' confidence, performance and social interaction at work lasting as long as needed to achieve the relevant competency. Effective coaching relates to emotional intelligence building confidence and self-awareness.*

- **Have you been mentored or coached whilst at ateb?**

**In an informal way, yes, by my line manager and via peer support by other managers, when faced with challenging situations.**

- **How was this established?**

**With colleagues, through conversations usually starting 'how are things?' which then enables you to enter into 'coaching conversation' within a safe environment.**

- **If not, has formal mentoring or coaching been offered?**

**I have not been offered or experienced a 'formal coaching session'. Following on from recent OPSIS Training, this is something as a forward thinking, productive and solution based organisation we want to implement going forward.**

- **Would you access this? If not, why not?**

**Yes, I would access this and would happily promote mentoring / coaching within ateb.**

**Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**

**I feel I do have a certain level of skills and knowledge in this area, although I do not possess any formal qualification.**

**I employ the some of the skills required for mentoring and coaching daily within the work setting with staff and customers alike:**

- **If formal – jointly agreeing coaching is right and appropriate**
- **Active listening – understanding the context**

- Reflecting back & mirroring
- Summarising to check understanding & draw out clarity
- Explore & evaluate options together / pros & cons associated
- Pin down opportunities and benefits of a particular course of action
- Goal setting with clear specific timelines
- Encouragement and to demonstrate belief in the ability of the person which is ongoing through the process

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

Yes I would but feel I would benefit from further coaching / training to take it to a formal level.

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

Yes, for the reasons above. In brief, it would be a positive way of supporting colleagues and my team, through mentoring and coaching process, with wider benefit to the organisation as a whole.

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

I would certainly, hence this covered within OPSIS Training as a very beneficial tool to utilise within the Achieve Framework.

**From:** [Victoria Evans](#)  
**To:** [Kate Houston](#)  
**Subject:** RE: Coaching and mentoring  
**Date:** 02 March 2020 15:12:27

---

Here you are Kate

**Victoria Evans**  
**People and Communications Manager**



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*Coaching is more a non-directive form of development focusing on specific goals, tasks and skills building an individuals' confidence, performance and social interaction at work lasting as long as needed to achieve the relevant competency. Effective coaching relates to emotional intelligence building confidence and self-awareness.*

- **Have you been mentored or coached whilst at ateb?**

I have been informally coached by Nick during our 121 and also during the OPSIS training where we focussed on this on one module

- **How was this established?**  
It was not formal therefore it was informal and evolved, I am a trained coach and I could tell by the language Nick was using that he was using coaching technique with me

- **If not, has formal mentoring or coaching been offered?**  
NO

- **Would you access this? If not, why not?**

If I needed it I would

- **Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**

I am a trained coach, receiving training when I was in the NHS, it was a NHS/University of Warwick qualification. I do feel I have the necessary skills and experience to coach as I have been trained in the techniques and have also recently had a refresher on the OPSIS training

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

I would be willing however as we are a small organisation I don't think it is that easy on a formal setting as you know so much about the individual and the situations they are seeking support with. I do regularly coach on an informal basis, using the questioning techniques I have learnt. I do this with people who report in to me, peers and other colleagues

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

as mentioned above I think we are a small organisation and a formal impartial coaching programme would be difficult to run, I do think that more informal coaching could be used more regularly in the organisation or perhaps we link with other organisation to provide formal coaching When I worked for the NHS we had a regional network of

coaches who were prepared to coach people in other organisations and this worked really well

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

Yes I do and this is something that has been covered in OPSIS

**From:** [Jane Nutland](#)  
**To:** [Kate Houston](#)  
**Subject:** FW: Coaching and mentoring  
**Date:** 03 March 2020 14:28:57

---

Hope this helps

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**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>  
**Sent:** 02 March 2020 13:21  
**Subject:** Coaching and mentoring

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- **Have you been mentored or coached whilst at ateb?**  
I was supported with training when started role at ateb. I then progressed to my current role and was given ad hoc coaching with a colleague as and when I struggled. This was purely because I got on well with the colleague and would trust their approach. I have a similar relationship with another colleague, I will often turn to them for guidance when my issues relate to housing rather than managing people.

I have been given training through an external provider that includes mentoring and coaching which has been beneficial.

I haven't officially been asked/offered if I require mentoring or coaching to manage my team but I do know that I have a few colleagues I could turn to for different kinds of support.

- **How was this established?**  
Explained above
- **If not, has formal mentoring or coaching been offered?**  
Not as such
- **Would you access this? If not, why not?**  
Yes I would access. I would have found really beneficial if this was offered at the beginning of my role when I struggled most.

- **Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**  
Yes I do now.

Some of my best attributes are supporting people through change, helping them understand the reasons for it and encouraging them to own the changes. I thrive at developing my teams confidence. I have also developed my skills with managing underperforming people a lot over the last couple of years. I've become very good at changing my approach when dealing with different personalities to get the best out of people.

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

Yes I'd be happy to share what I can with others.

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

Yes but I think it should be with certain members of staff or external professionals.

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

I would with how I am using it with my team however I don't think the Achieve Framework has been launched very well and therefore isn't used consistently across teams which is concerning. I think this really needs looking at and a proper hard launch is needed.

**From:** [Kate Allen](#)  
**To:** [Kate Houston](#)  
**Subject:** RE: Coaching and mentoring  
**Date:** 10 March 2020 15:55:30

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**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>

**Sent:** 02 March 2020 13:21

**Subject:** Coaching and mentoring

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- **Have you been mentored or coached whilst at ateb?**  
No
  
- **How was this established?**  
N/A
  
- **If not, has formal mentoring or coaching been offered?**  
No
  
- **Would you access this? If not, why not?**  
Yes, I completed my ACCA whilst employed and would have found a formal mentoring beneficial either internally or via another HA
  
- **Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**

**I have been on Opsis training within Ateb giving me tools and techniques to coach and together with many years of experience of managing staff I feel I could mentor colleagues**

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

**Yes**

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

**Yes. I think it would advantageous for succession planning and retaining staff and great as a motivator.**

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

**I think it is moving in the right direction and Opsis has contributed to this culture. I am also studying for an ILM qualification and this is helping me to understand the direction of the organisation.**

**From:** [Jess James](#)  
**To:** [Kate Houston](#)  
**Subject:** RE: Coaching and mentoring  
**Date:** 02 March 2020 13:43:05

---

Have added responses – is this enough info?

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**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>  
**Sent:** 02 March 2020 13:21  
**Subject:** Coaching and mentoring

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- **Have you been mentored or coached whilst at ateb?**

Yes

- **How was this established?**

*I felt that I needed some additional support as I did not have much training at the start of taking up the job, I had asked for further support and my team leader asked another more experience member of staff to mentor me we did over a couple of months. She was available for me to ask for advice and then we would meet and look through my cases and she would offer some support/ advice and re-assure me about how I was prgressinh.*

- **If not, has formal mentoring or coaching been offered?**

- **Would you access this? If not, why not?**

- **Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**

*I feel I could mentor someone, I have a lot of experience with supporting people particularly young people and victims of domestic abuse with managing tenancy, benefits etc*

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

*I would but I do feel that it would be a bit of a struggle with my work load.*

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

*I do expect that this would be helpful but I would not necessarily want to complete one if it was a lengthy course. I think some guidance would be helpful though rather than a formal course.*

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

*I do not feel that I have noticed this through the Achieve yet.*

**From:** [Suzanne Hobday](#)  
**To:** [Kate Houston](#)  
**Subject:** RE: Coaching and mentoring  
**Date:** 05 March 2020 14:17:34

---

Hi Kate

See below as requested.

Suze

**Suzanne Hobday**  
**Finance Officer**



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Haverfordwest, Pembrokeshire, SA61 1QP  
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**From:** Kate Houston <[Kate.Houston@atebgroup.co.uk](mailto:Kate.Houston@atebgroup.co.uk)>

**Sent:** 02 March 2020 13:21

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- **Have you been mentored or coached whilst at ateb?**  
*No, I haven't been mentored or coached whilst at ateb*

- **How was this established?**

*N/A*

- **If not, has formal mentoring or coaching been offered?**

*No*

- **Would you access this? If not, why not?**

*Maybe – it depends on the form and area of coaching/mentoring being offered*

- **Do you feel you have the skills and attributes required to formally mentor or coach? If you do, please provide a short list of what you believe your skills and attributes are?**

*No – I don't feel I have the skills and attributes required for this*

- **Would you be willing to formally coach or mentor an employee, if not, please explain why?**

*No – I feel I would need to have the required skills and attributes and have been coached or mentored myself before I felt able to do this*

- **Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

*Yes – I think it could be a good idea, especially for younger employees joining ateb*

- **Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

*Yes – I think the Achieve Framework will help to achieve this*

**From:** [Philomena Roche](#)  
**To:** [Kate Houston](#)  
**Subject:** Mentoring survey  
**Date:** 03 March 2020 11:16:26

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- Have you been mentored or coached whilst at ateb?  
*yes*
- How was this established?
- *informally*
- If not, has formal mentoring or coaching been offered?
- *Not at the time*
- Would you access this? If not why not?
- *If it was from and outside source*
- Do you feel you have the skills and attributes required to formally mentor or coach? If you do please provide a short list of what you believe your skills and attributes are?  
*Don't have leadership skills but lots of empathy*
- Would you be willing to formally coach or mentor an employee, if not, please explain why?  
*Would wish to have formal qualifications*
- Do you think that a formal mentoring or coaching programme would be advantageous, if so state why?  
*Yes I do think a formal programme would be advantageous for new staff to feel they had support. Also because of confidentiality and prejudgement I think it would be advantageous that the programme was not inhouse.*
- Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?  
*It is early days but I think this will be beneficial*

**Philomena Roche**  
Customer Service Advisor



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**From:** [Philippa Tuck](#)  
**To:** [Kate Houston](#)  
**Subject:** RE: If you have the time please can you complete this for me  
**Date:** 10 March 2020 14:21:01

---

Hi Kate,

**Have you been mentored or coached whilst at ateb?**

No

**How was this established?**

N/A

**If not, has formal mentoring or coaching been offered?**

No

**Would you access this? If not, why not?**

Yes. It's important to network and continue personal development so I probably would accept if this was offered.

**Do you feel you have the skills and attributes required to formally mentor or coach?**

No

**If you do, please provide a short list of what you believe your skills and attributes are?**

**Would you be willing to formally coach or mentor an employee, if not, please explain why?**

N/A

**Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

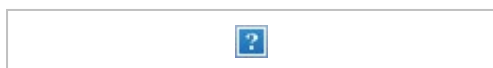
Yes. It is a good way to share skills, knowledge and experiences to upskill other employees and offer support to one another.

**Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

I don't believe Achieve is a tool being used to move towards a coaching culture and if this is what it is being used for it has not been clearly communicated. I define coaching as a passing on of knowledge and a support system for personal development. This could also be used to overcome work based challenges so as being unable to complete a task and requiring that additional coaching to overcome this.

I believe Achieve is used for setting targets and tracking individuals progress and therefore used as a performance management tool.

**Philippa Tuck**  
**People Assistant**



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---

**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>

**Sent:** 10 March 2020 11:11

**Cc:** Kate Allen <Kate.Allen@atebgroup.co.uk>; Bethan Elliott <Bethan.Elliott@atebgroup.co.uk>; Scott Nash <Scott.Nash@wwcr.co.uk>; Ceri Barnett <ceri.barnett@atebgroup.co.uk>; Victoria Evans <Victoria.Evans@atebgroup.co.uk>; Nicola Phillips <Nicola.Phillips@atebgroup.co.uk>; Suzanne Hobday <Suzanne.Hobday@atebgroup.co.uk>; Philippa Tuck <Philippa.Tuck@atebgroup.co.uk>; Debbie Yates <Debbie.Yates@atebgroup.co.uk>; Julie John <Julie.John@atebgroup.co.uk>; Beverley Griffiths <Beverley.Griffiths@atebgroup.co.uk>; Philomena Roche <Philomena.Roche@atebgroup.co.uk>; Jane Robinson <Jane.Robinson@atebgroup.co.uk>; Jane Nutland <Jane.Nutland@atebgroup.co.uk>; Linzi Laugharne <Linzi.Laugharne@atebgroup.co.uk>; Antony James <Antony.James@atebgroup.co.uk>; Jess James <jess.james@atebgroup.co.uk>; Lyndsey Dafoe <lyndsey.dafoe@atebgroup.co.uk>

**Subject:** If you have the time please can you complete this for me

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**Have you been mentored or coached whilst at ateb?**

**How was this established?**

**If not, has formal mentoring or coaching been offered?**

**Would you access this? If not, why not?**

**Do you feel you have the skills and attributes required to formally mentor or coach?**

**If you do, please provide a short list of what you believe your skills and attributes are?  
Would you be willing to formally coach or mentor an employee, if not, please explain why?**

**Do you think that a formal mentoring or coaching programme would be advantageous, if so, state why?**

**Would you agree that ateb is moving towards a coaching culture utilising the Achieve Framework?**

EV. 2

# Vision

of what good looks like for ateb

**ateb** *better living solutions*

 9/ Intro

 9/ Group

 9/ Purpose

 12/ DNA

 19/ Plan

 28/ Deliver

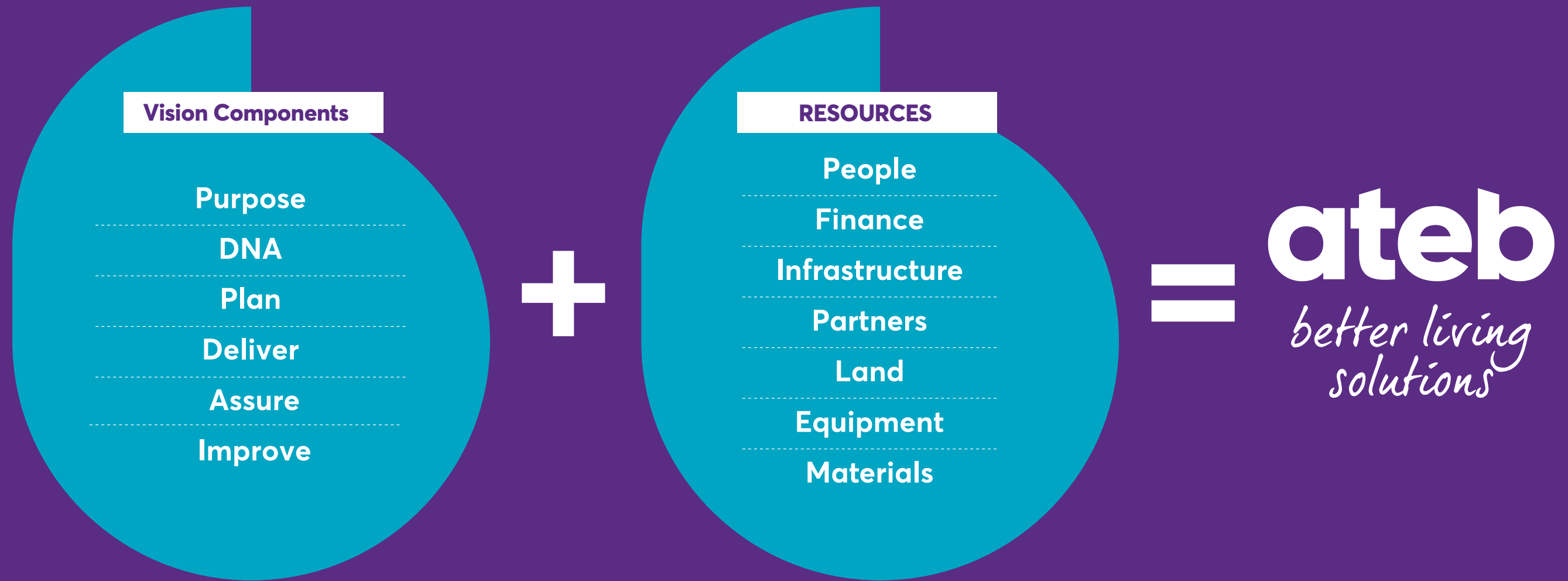
 28/ Assure

 32/ Improve

 40/ Summary



Our **Vision** describes how **6** components will collectively get the best from the resources we use:



Our world doesn't stand still so nor should we, our vision of good will constantly evolve to reflect our changing circumstances, demands, operating conditions and relationships.

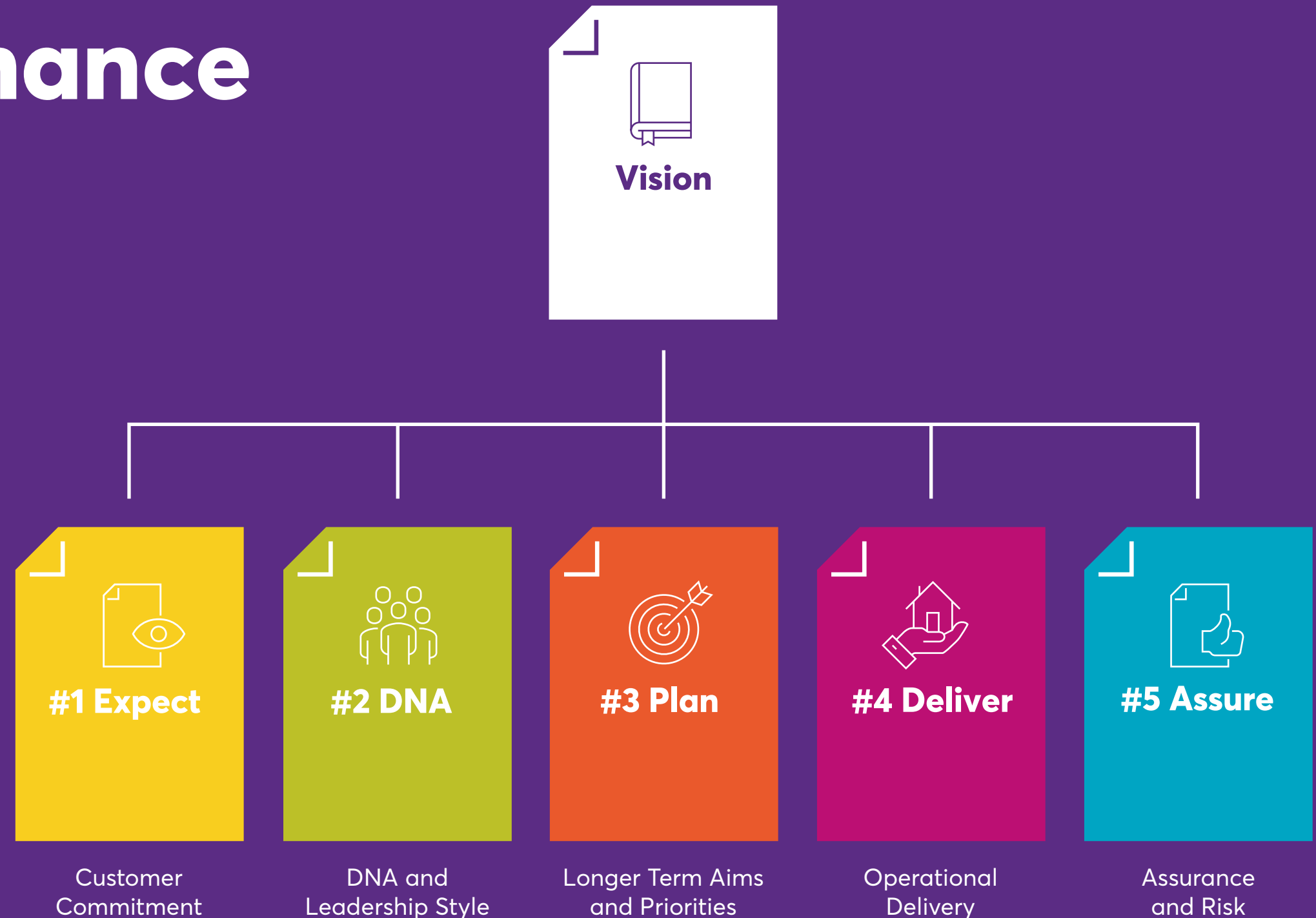


# Good Governance

## What does good look like?

Our Vision and its 5 supporting documents form our Governance Framework as it provides the framework for the supply of Value for Money services to meet the demands of the people and communities we serve throughout West Wales ...

"The VISION is what we believe our 'good' will look like".





# DNA



*if it matters to you, it matters to us !*

**We believe that having the right culture is important to our performance and success.**

We aspire to a culture or DNA that has:

- An inspiring vision and strategy
- Positive inclusion and participation
- Enthusiastic teams and collaborative working
- Support and autonomy for staff to innovate

Our DNA will help us to deliver a **great service to our customers**, utilise our resources efficiently, develop ourselves and others, collaborate with partners and have fun making a difference.

**#InYouWeTrust**  
**#AccessAllAreas**  
**#GetThingsDone**



# What's in our DNA?

## #InYouWeTrust

**Trust** is the essential building block to our organisation, without it, things just won't be as good. We will be **open** in our approach so that we can learn from each other's experiences and we will **care** about what we do and how we do it.

## #AccessAllAreas

We will be **inclusive** in everything we do as diversity of background, experiences, skills and views enrich our work and services. We know we will need help, so we will seek out and sustain strong **collaborative** arrangements with our partners and stakeholders.

## #GetThingsDone

We will take **ownership** of our customer outcomes and be accountable for our actions. We will have a **proactive** attitude and always seek to be **innovative** and improve what we do.

Things change, so we must always be **flexible** to adapt to situations and make sure that we are always delivering the right outcomes, efficiently with great customer experience.



The ateb group leadership hierarchy is as follows:



ateb group will continually develop its leadership style.

We have the following leadership groupings within our team structure:

| Level | Title                  | Leadership Role                                                                             |
|-------|------------------------|---------------------------------------------------------------------------------------------|
| 1     | Board                  | Governance                                                                                  |
| 2     | Chief Executive        | Overall leadership framework responsibility                                                 |
| 3     | Director               | Leads on the development and translation of strategic priorities to meet our strategic aims |
| 4     | Manager                | Leads one or more service areas as detailed in the Service Delivery Plan                    |
| 5     | Team or Service Leader | Leads a particular team or service                                                          |
| 6     | Delivery Leads         | Leads on aspects of service delivery                                                        |



ateb group recognises that great leadership must exist throughout the organisation. The leadership hierarchy must encourage a leadership style throughout the ateb group that:

> **Promotes our Purpose**

> **Supports our DNA**

> **Sets clear outcomes for our efforts**

> **Defines operating boundaries and risk**

> **Promotes learning over failure**

> **Supports colleagues to experiment to achieve more**

> **Appreciates colleagues' achievements, efforts and commitment**

We believe that good leaders will always:

1/ Pay **attention** to people

2/ **Understand** people needs

3/ Show **empathy** in their response

4/ Help to **resolve** issues



All our people will need to demonstrate the following personal characteristics and attributes appropriate to their role and their leadership group:

|                                                                                                                           |                                                                                                                    |                                                                                                          |                                                                                                                   |                                                                                                      |                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| <b>Technical Competency</b><br>We will make sure we have the right skills and expertise                                   | <b>Decision Making</b><br>We need people throughout our organisation to make the right decisions at the right time | <b>People Management</b><br>We must always get the best from our people                                  | <b>Team Working</b><br>So much more can be achieved through good team work                                        | <b>Financial Control</b><br>To help as many people as we can we must be financially aware and astute | <b>Communication</b><br>Is the glue that will keep our organisation together                      |
| <b>Organisational Skills</b><br>Agility and flexibility can only be achieved through well organised and connected systems | <b>Innovation</b><br>To make our resources go further, we need to be thinking... What If?                          | <b>Customer Service</b><br>Is at the heart of what we do, we are a customer service focused organisation | <b>Project/Process Management</b><br>Improvement can only be embedded where there is effective project management | <b>Enthusiasm</b><br>We are here to make a difference, not to make up the numbers                    | <b>Technology Competency</b><br>In our fast moving digital world we must be technologically adept |



**What our  
customers  
should  
expect ...**

**if it matters to you, it matters to  
us ... Our shared committment**

Above all, we will continually  
strive to deliver...  
the right **outcomes, efficiently**  
with **great customer experience...**  
for the people and  
communities of West Wales.



## B/ Improvement Reporting

Improvement progress will be monitored by all and reported in accordance with the following schedule:

**Strategic Plan** – Issued 3 yearly by the board following full 360 degree engagement of service users and providers.

**5 and 30 Year Business and Financial Plans** – Issued annually with a comparison to the base plan (set with every new strategic plan) and a change statement listing the reasons for changes from the previous year.

**Strategic Plan Review** – Issued annually to show progress on our strategic priorities and address whether we are;

- 1 > Increasing Corporate Strength
- 2 > Improving Service Delivery
- 3 > Delivering New Business Growth

**How are we doing reports** – Customer focused quarterly reports based on the service delivery report approved by Board.

**Board Reporting** – Board reports will be split into;

- 1 > For Decision
  - 2 > For Discussion
  - 3 > For Information
- For discussion items will be focused on the 3 strategic aims supported by our engage and Involve projects.

The 'for discussion' sessions will be a range of written reports, workshops, training and presentation approaches focused on improvement.



### **Management Accounts –**

Quarterly accounts to Board, Welsh Government and lenders. Monthly accounts to senior team.

### **Statutory Accounts and**

**Statements –** Annually to Board, Welsh Government and lenders.

### **Annual Assurance Report –**

Issued annually to Welsh Government detailing our progress on achievement of the regulatory performance standards.

### **Annual Review/Self Evaluation –**

Issued annually to Welsh Government detailing our view of our performance across the year.

### **Quarterly Service Delivery**

**Reports –** Board will have 4 service delivery reports per year to show service delivery performance, performance trends and actions being taken to improve service outcomes, efficiency and customer experience.

**Corporate Review** - Issued annually to describe changes and improvements to corporate issues over the last year

**Newsletters –** We will issue a range of publications to promote the work of the group and how people and communities can engage with us to improve.

### **Engage 2 Improve e2i –**

An initiative to put tenant issues to the heart of our improvement process.

### **Involve 2 Improve i2i –**

An initiative to involve all our colleagues in the future direction and improvement of the organisation.



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**From:** Linzi Laugharne  
**To:** Kate Houston  
**Subject:** RE: Mentoring and coaching assignment  
**Date:** 24 March 2020 18:40:17  
**Attachments:** [Coaching.docx](#)

---

Sorry for the delay – I hope this helps xx

---

**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>  
**Sent:** 20 March 2020 20:53  
**To:** Linzi Laugharne <Linzi.Laugharne@atebgroup.co.uk>  
**Subject:** Mentoring and coaching assignment

Hi Linzi

Please can you do me a favour to help me with one of my assignments for college? Not sure if you will have the time but if you can it would really help me.

If you are happy to do so please can you write a statement, including your electronic signature on separate email to include:-

- As a supervisor you were selected to attend OPSIS training which was developed to encourage a learning culture passing on your newly acquired skills to your team. To ensure your knowledge is passed on to your team you have team away days to pass on this knowledge. One of elements to the training was adopting a coaching approach.
- You could mention some of the things you may have learnt from the training?
- You could say that you have used some of the tools and techniques in your day to day duties like asking probing questions, reflection and giving and receiving feedback already especially with Achieve Framework which you feel is the beginning of initiating a coaching culture in the future.
- Please can you mention that the Achieve Framework links not only to the individual but to both the team and organisational objectives. This is a useful tool to empower and initiate decision making within the team.

Thanks.

Kate.

Mentoring is not formally undertaken at ateb but as Kate has gained a coaching qualification she has utilised this on a few occasions: We have supported the CIPD Steps Ahead scheme, mentoring a younger individual to develop the skills to obtain employment; peer-to-peer mentoring relating to performance and job outcomes and for self-improvement; improving a colleague's performance, confidence and personal growth.

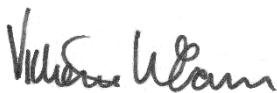
The People & Communication Team offer informal mentoring to GTBAL which is ateb's chosen good cause for the year. They raise awareness of mental health and run a café where ateb hosts a day a month to provide advice on employment and housing related matters. Kate has been the ateb representative supporting people by providing employment advice such as CV writing, applying for jobs to interview techniques.

Developing a coaching culture at ateb is part of a much larger cultural change programme. We have embarked on an Improving Organisational Effectiveness programme for line managers with a company called OPSIS, part of which looks at coaching and mentoring. The OPSIS programme has a number of elements to it some of which are: understanding you, understanding how you are perceived as a line manager, providing effective feedback and communicating with your team, involvement of the team, developing high performing teams. We are also developing an Achieve Framework to replace our appraisal system which focuses more on ongoing coaching and mentoring as opposed to an annual appraisal. This has been trialled with several line managers who have provided feedback, and we are currently being audited on this trial to establish the effectiveness of Achieve before we develop it further and roll out across the organisation.

We are a small organisation and a formal coaching and mentoring programme may not be appropriate for us at this time, however the OPSIS programme together with our cultural change and DNA are underpinned by the principles of coaching and mentoring. I am aware of a number of managers, including myself, that do use coaching and mentoring on a less formal basis, incorporating the techniques into their day to day management style.

Kate has been tasked with designing a SharePoint page for those interested in informally coaching or mentoring. This will be a one stop page with useful content and techniques including: the benefits to both coach/mentor or coachee/mentee; contracts; powerful questions; active and empathic listening and links to useful websites such as CIPD, ACAS.

Kate already corridor coaches team leaders, supervisors and managers informally and the People Team offer informal coaching to new recruits focusing on specific goals such as gaining confidence, skills and time management.



Victoria Evans

People & Communications Manager

**From:** Lee Bridges  
**To:** Kate Houston  
**Subject:** Feedback request:  
**Date:** 23 March 2020 09:14:05

---

Hi Kate,

I hope you find the following feedback useful:

- As a line manager I have been using the Achieve Framework to provide my team with continuous feedback via 1:1's. This has been used as a tool to set targets for our department and to pass on collective and individual targets which are aligned to service areas.
- Following the training you provided me on how to use the Achieve Framework as this was a new format. Thank you for the encouragement you provided to me to use the Achieve Framework. This has allowed me to develop skills within my team assigning specific projects which will motivate the team, to manage performance and create better communication between the individual and myself.
- From my attendance at OPSIS training I have begun to formulate a range of coaching techniques which assist with the Achieve Framework. Thank you for signposting me to the newly developed SharePoint page where I have been able to access a range of information such as open questions, how to conduct coaching and how to give and receive feedback.

Your continued support of my personal development as a line manager is greatly appreciated and I look forward to continuing to work together on further development.

Best wishes

**Lee Bridges**  
**Money Solutions Team Leader**



Tel | [01437 763688](tel:01437763688)  
 Meyler House, St. Thomas Green,  
 Haverfordwest, Pembrokeshire, SA61 1QP  
[atebgroup.co.uk](http://atebgroup.co.uk)



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd

neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhowch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

From: [katehoustonjames@gmail.com](mailto:katehoustonjames@gmail.com)  
 To: [Kate Houston](#)  
 Date: 28 March 2020 11:05:36

*Lystysgrif - Certificate*

Hyn sydd i dystio bod / This is to certify that

**Kate Houston**

Wedi ennoll y credydau isod / has been awarded the following credits

| Cyfeirnod<br>Module Code | Enw'r Modiwl<br>Module Title  | Credydau a dyfarnwyd<br>Credits awarded | Marc<br>Mark |
|--------------------------|-------------------------------|-----------------------------------------|--------------|
| DSAW 4005                | Mentoring in the<br>workplace | 20                                      | 63           |

*[Signature]*  
 Dr Rhianon Washington  
 Prif Ddiwtor Elevate Cymru / Lead Tutor Elevate Cymru

01/06/2015  
 Dyddiad / Date

Map's Project Elevate Cymru yn y Gwaith, a gyllidir gan raglan gydgyfngieriant Cronfa Gymdeithasol Ewrop  
 The Elevate Cymru project is part of the Work-based Learning Programme, funded by the Convergence European Social Fund

 **Y Drindod Dewi Sant**  
 UNIVERSITY OF WALES  
 Trinity Saint David

 **elevate**  
 Work-based Learning  
 Programme

 **Map's Project**  
 Work-based Learning  
 Programme



### Assessment sheet

| Name of student<br>Kate Houston                                                                                                             |                  | Module – IWBL 4034<br>An Introduction to Mentoring in the Workplace<br>Module Tutor: Dr Rhianon Washington |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
|---------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------------------------------------------------------------------------------------------------|----------------|-------------|-----------------------------------------|---------|-----------------------------|---------|----------------------------------------|---------|-----------------------------------------|---------|-----------------------------|---------|--------|----|
|                                                                                                                                             |                  | Individual Marking                                                                                         |                |             |                                         |         | Agreed Internal Marks       |         |                                        |         |                                         |         |                             |         |        |    |
|                                                                                                                                             |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
|                                                                                                                                             |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Module Specific<br>[Overall 80%]                                                                                                            |                  |                                                                                                            |                |             | Generic<br>Criteria<br>[Overall<br>20%] |         | Overall<br>Module<br>Result |         | Module<br>Specific<br>[Overall<br>80%] |         | Generic<br>Criteria<br>[Overall<br>20%] |         | Overall<br>Module<br>Result |         |        |    |
| Ass 1<br>35%                                                                                                                                | Ass 2<br>35%     | Ass 3<br>30%                                                                                               |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Ass 1: 1st assignment                                                                                                                       | 63/<br>22.0<br>5 | 60/<br>21                                                                                                  | 64.8/<br>19.44 | 66/<br>13.2 | 62.49/<br>49.99                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Ass 2: 2nd assignment                                                                                                                       |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Ass 3: Observed session                                                                                                                     |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| First Marker:                                                                                                                               |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Rhianon Washington (1)                                                                                                                      |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Second Marker:                                                                                                                              |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| Sarah Loxdale (2)                                                                                                                           | 62/<br>31        | 64/<br>32                                                                                                  |                | 62/<br>12.4 | 63/<br>50.4                             |         |                             |         |                                        |         |                                         |         |                             | 50      | 13     | 63 |
| Module Specific Criteria – 80%                                                                                                              |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
|                                                                                                                                             | 81               | 76 – 80                                                                                                    | 70 – 75        | 67 – 69     | 64 – 66                                 | 60 – 63 | 57 – 59                     | 54 – 56 | 50 – 53                                | 47 – 49 | 44 – 46                                 | 40 – 43 | 30 – 39                     | 20 – 29 | 1 – 19 | 0  |
|                                                                                                                                             |                  |                                                                                                            |                |             | 2                                       | 1       |                             |         |                                        |         |                                         |         |                             |         |        |    |
| analyse the range, relevance and value of mentoring processes, tools and techniques;                                                        |                  |                                                                                                            |                |             |                                         |         |                             |         |                                        |         |                                         |         |                             |         |        |    |
| demonstrate a knowledge and understanding of the principles of effective mentoring and the issues that can arise from the mentoring process |                  |                                                                                                            |                |             |                                         | 1       |                             |         |                                        |         |                                         |         |                             |         |        |    |
| identify and apply a mentoring model that meets the needs of their workplace                                                                |                  |                                                                                                            |                |             |                                         | 2       | 1                           |         |                                        |         |                                         |         |                             |         |        |    |

| Mentoring Session                       | Excellent | Very Good | Good    | Satisfactory |
|-----------------------------------------|-----------|-----------|---------|--------------|
| Planning and Management                 |           | 1         |         |              |
| Process, structure, purpose and content |           |           | 1       |              |
| Questioning and listening               |           |           | 1       |              |
| Feedback (Mentor to client)             |           | 1         |         |              |
| The mentoring relationship              |           | 1         |         |              |
| Actions agreed and planned              |           | 1         |         |              |
| Review and Conclusion                   |           | 1         |         |              |
| Generic Criteria – 20%                  |           |           |         |              |
|                                         | 81 +      | 76 – 80   | 70 – 75 | 67 – 69      |
|                                         |           |           | 64 – 66 | 60 – 63      |
|                                         |           |           | 57 – 59 | 54 – 56      |
|                                         |           |           | 50 – 53 | 47 – 49      |
|                                         |           |           | 44 – 46 | 40 – 43      |
|                                         |           |           | 30 – 39 | 20 – 29      |
|                                         |           |           | 1 – 19  | 0            |
| Cognitive and Intellectual Skills       |           |           | 1       | 2            |
| Transferable and Practical Skills       |           |           | 1       | 2            |

First Marker's comments:

You offer a very good exploration of mentoring approaches related to your organisation's needs identifying the appropriate hybrid developmental model for a long term mentoring programme. You demonstrate a very good understanding of the skills associated with developmental mentoring. You successfully use case studies to describe the progress of the scheme. You will well but try to avoid one sentence paragraphs as it can feel like a bulleted list. Do proof read your work carefully for sense, for example, in assignment 1, page 2, paragraph 8 the first phrase is to roll out the programme and greater its exposure to all new recruits. There is a very good attempt at referencing.

Observation

This was a very good, well planned and managed mentoring session in a suitable environment. It was well structured that followed a clear, written plan. Do ensure that any documentation arising from the session is kept securely to safeguard confidentiality. You successfully challenged the mentee's indecisiveness yet remained supportive and encouraging. You asked powerful, thought-provoking questions but you occasionally interrupted the mentee with suggestions and ideas. In future sessions, rather than interrupt the mentee's flow of thought write down any questions or thoughts that you may wish to raise when the mentee has stopped speaking. You won't therefore lose the ideas and you may be able to give her your full attention. Inform her at the beginning of the session that you may make notes.

The session was very dynamic and filled with positive energy and clearly benefited the mentee.

Signed: *RWJ*  
Dated: 27/4/15

**Second Marker's comments:**

Kate has provided a good critical analysis of the various mentoring models available to the organisation. The choice of model is justified and the benefits of adopting a developmental mentoring process are discussed.

The reflective journal analyses the effectiveness of the selected mentoring method and demonstrates how the mentoring scheme has benefited the mentee and the organisation. In her reflective review Kate also analyses her own performance as a Mentor and identifies examples of good practice and areas for development.

The assignment is well presented and draws on a range of appropriate theory. A good attempt has been made to adopt the Harvard Referencing System but care needs to be taken with the proof reading of assignments.

Signed: *Shordale*  
Dated: 27th April 2015

**Moderation:**  
After professional discussion at which the overall work was considered, final marks agreed between first and second marker at a moderation meeting (sign and date)

*Shordale* *RWJ*  
27/4/15

Sent from my iPhone

**From:** [Joanne Thomas](#)  
**To:** [Kate Houston](#)  
**Subject:** Witness Statement  
**Date:** 17 April 2020 10:24:29  
**Attachments:** [image001.png](#)

---

Kate Houston and I attended a Mentoring in the Workplace course at University of Wales Trinity St David in 2014, which was funded through a distance learning scheme GWLAD.

The course focused on providing learners with the knowledge and practical skills to effectively mentor within the workplace. Throughout the course we gained knowledge about different forms of mentoring and explored the practicalities of our workplace to identify which forms of mentoring would be best suited, and how to professionally manage a mentoring relationship including developing a mentoring contract to create professional boundaries and the limits of confidentiality. The course developed our confidence to mentor through role play, theoretical and practical knowledge and teaching us different interview techniques.

The course enabled us to improve the mentoring scheme we had within the workplace where we mentor new employees. As a small organisation recruitment is not continuous however, I estimate we have mentored between 12 – 15 new employees since attending the course.



Signed:

Name: Joanne Thomas

Position: People Advisor



**ateb Group**  
@TheatebGroup

- Home
- Posts
- Events
- Reviews
- Videos
- Photos
- About
- Community

Create a Page

Like Share Suggest Edits ...

TUE, 10 MAR AT 10:30 UTC

**E2i Co-ordination Group**

Meyler House · Haverfordwest

Other

Like Comment Share

**ateb Group**  
3 March at 09:35 · 🌐

We are down at Get The Boys A Lift tomorrow offering free advice & support, good company & they also do great coffee! We work in collaboration with people like these guys to help create a better living solution. #WeAreAteb



4 🌐 4 shares

Like Comment Share

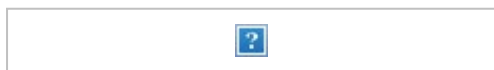
**From:** Poppy Kucyj  
**To:** Kate Houston  
**Date:** 11 March 2020 11:52:14

---

I organised for key members of staff at ateb to share their experience and skills with our chosen mental health charity GetTheBoysALift and the people who use their services. These are people who may need a range of help. Kate goes down to GetTheBoysALift and provides mentoring to those who need it on how to apply for jobs, CV writing, interview techniques and more

**Poppy Kucyj**

**Communications Assistant**



Tel | [01437 763688](tel:01437763688)

Meyler House, St. Thomas Green,  
Haverfordwest, Pembrokeshire, SA61 1QP

[atebgroup.co.uk](http://atebgroup.co.uk)



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## Achievement Framework - Human Resources

Kate

Team: **HR**  
 Role Profile: **HR Advisor**  
 Role Title:  
 Line Manager: **Victoria Evans**  
 Directorate: **Corporate**

Service Areas: **SA/012 - Recruitment**  
**SA/013 - People Management**  
**SA/014 - Learning & Development**  
**SA/015 - Wellbeing**

| Log ref | Log type | Date required or Date acheived | SDP or DNA | Completion status | Description                                                                                                    | Managers Comments                                                                                        |
|---------|----------|--------------------------------|------------|-------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| Kate    |          |                                |            |                   |                                                                                                                |                                                                                                          |
| 2       | Action   | 13/09/2018                     | SDP        | Achieved          | SA/12/IA7 Development of LinkedIn story calendar for 12 months to promote DNA/Leadership/Team News etc (Joint) |                                                                                                          |
| 3       | Action   | 30/08/2018                     | SDP        | Achieved          | SA/12/IA12 Hold new starter session to obtain views of induction, HR and Local (Joint)                         | Now completed                                                                                            |
| 4       | Action   | 31/01/2019                     | SDP        | Pending           | SA/12/IA13 Development of Health & Wellbeing Induction booklet to include H&S and i-act tools                  | To link in with review of induction' JT to do other section                                              |
| 5       | Action   | 01/12/2018                     | SDP        | Pending           | SA/12/IA15 Development of interim paperwork for shortlisting and interviews to link in with role profiles      | Met with managers now, develop paperwork & speak to JOH re: what are the aims of the test for the MSO?   |
| 6       | Action   | 31/08/2018                     | SDP        | Not Complete      | SA/12/IA27 Publish DofE testimonials (Joint)                                                                   |                                                                                                          |
| 7       | Action   | 30/09/2018                     | SDP        | Achieved          | Development of "at a glance" guide to our benefits                                                             | Flash card template developed instead                                                                    |
| 8       | Action   | 31/08/2018                     | SDP        | Not Complete      | SA/15/IA9 Identify forms that can be moved over to Google Forms (Joint)                                        |                                                                                                          |
| 9       | Action   | 30/09/2018                     | SDP        | Part Complete     | SA/15/IA43 Review & update severe weather procedure and develop "at a glance guide"                            | Almost finished was waiting on SD, Liaise with Mark Lewis instead re: time to notify staff               |
| 10      | Support  | 01/01/2020                     | SDP        | Pending           | CIPD required to enhance skills and support service delivery                                                   | CIPD fully funded course starting 19/9/18, struggling at the moment, no support identified at the moment |
| 11      | Repeat   | 31/10/2018                     | SDP        | Pending           | SA/12/IA27 Publish DofE testimonials (Joint)                                                                   | booked in with TW 23/10                                                                                  |

## Personal Achievement Log - Human Resources

Kate

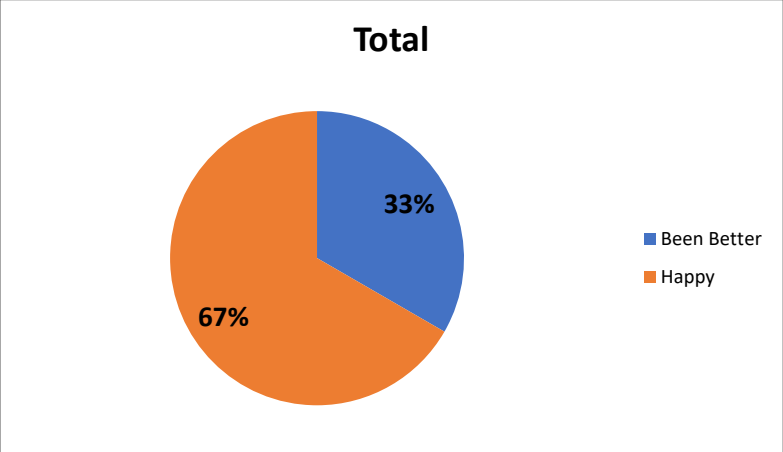
|    |         |            |     |          |                                                                             |                                                                                               |
|----|---------|------------|-----|----------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| 12 | Repeat  | 31/10/2018 | SDP | Achieved | SA/15/IA9 Identify forms that can be moved over to Google Forms (Joint)     | Google forms has been tested GDPR issues + others - it is not the right software for HR forms |
| 13 | Action  | 10/10/2018 | SDP | Achieved | Make sure all service hubs are up to date for Q2 reporting                  | Also list top 3 sickness reasons for quarters from now on                                     |
| 14 | SPOT    | 11/09/2018 | DNA | Achieved | Thanks for support to colleague in Excel training session                   |                                                                                               |
| 15 | Support | 01/12/2018 | SDP | Pending  | Some IT support requested however more practice may help resolve need       | Have had some experience with LinkedIn, continue with t                                       |
| 16 | Action  | 01/11/2018 | SDP | Pending  | Pull out stress information for National stress Week(joint)                 | Develop a draft programme which is fully costed                                               |
| 17 | Action  | 01/12/2018 | SDP | Pending  | Re-write the guidance on how to apply notes to reflect ateb/role profile    |                                                                                               |
| 18 | Action  | 31/01/2019 | SDP | Pending  | SA/15/IA9 Identify forms that can be moved over to electronic forms (Joint) | Investigate costs and suitability of Adobe Forms                                              |
| 19 | Action  | 31/01/2019 | SDP | Pending  | Review and rebrand Absence Management Procedure and develop Flashcard       |                                                                                               |

Personal Achievement Log - Human Resources  
Kate

| Barometer Measure | Amount of responses |
|-------------------|---------------------|
| Been Better       | 1                   |
| Happy             | 2                   |
| Grand Total       | 3                   |

Last Meeting  
Barometer

16/10/2018  
Been Better



| Ref | i2i Date   | Barometer   |                                                                                                      |
|-----|------------|-------------|------------------------------------------------------------------------------------------------------|
| 1   | 21/08/2018 | Happy       |                                                                                                      |
| 2   | 13/09/2018 | Happy       |                                                                                                      |
| 3   | 16/10/2018 | Been Better | Just generally feeling like this, nothing to really support her, just feeling that way at the moment |
| 4   |            |             |                                                                                                      |
| 5   |            |             |                                                                                                      |
| 6   |            |             |                                                                                                      |

Personal Achievement Log - Human Resources

Kate

PAL summary

| Pal Summary |          | Column Labels |               |         |         |             |
|-------------|----------|---------------|---------------|---------|---------|-------------|
| Row Labels  | Achieved | Not Complete  | Part Complete | Pending | (blank) | Grand Total |
| Action      | 4        | 2             | 1             | 6       |         | 13          |
| Repeat      | 1        |               |               | 1       |         | 2           |
| SPOT        | 1        |               |               |         |         | 1           |
| (blank)     |          |               |               |         |         |             |
| Support     |          |               |               | 2       |         | 2           |
| Grand Total | 6        | 2             | 1             | 9       |         | 18          |

**From:** Kate Houston  
**To:** Merrilee Phillips  
**Date:** 22 July 2019 15:13:00

---

Hi Merrilee

As you know we offer mentoring and all new starters are given the opportunity to arrange mentoring with HR.

I know you have indicated you are happy and feel you have fitted into your role but I will need to arrange a formal meeting to discuss this. Some individuals decide to be kept mentored for a short period and others are happy not to proceed.

Please can you let me know when you are available.

Thanks.

**Kate**  
**People Advisor**

**From:** Merrilee Phillips  
**To:** Kate Houston  
**Subject:** Statement  
**Date:** 25 March 2020 18:04:40

---

As a new employee Kate offered me informal mentoring during my probationary period to assist with any difficulties I had. At first I declined as I was happy with learning on the job but after a few months I decided to take her up on her offer.

Kate ensured I understood my Role Profile. My Supervisor had briefly ran through it but she ensured I understood what my key functions were how these are linked to the departments' goals, departments service areas and the Achieve Framework.

Kate listening to me as when I was feeling overwhelmed and encouraged me to talk to my supervisor with some of the concerns I had. I lacked confidence and I was unsure how I was performing.

Kate made me realise that I may need additional support and I could ask for this support and additional training.

Merrilee Phillips

**From:** [Joanne Thomas](#)  
**To:** [Kate Houston](#)  
**Subject:** Witness Statement  
**Date:** 17 April 2020 10:41:06  
**Attachments:** [image001.png](#)

---

Previously, a Learning & Development Plan would be created annually, collating L&D requests from each department manager under the categories of statutory, mandatory and departmental; this is department focussed as opposed to individuals. We are currently developing a new L&D scheme called Passport to Work which will link to role profiles. Every employee will receive a passport detailing L&D activities they will need to complete to be 'eligible' to work therefore, empowering employees to take ownership of their development alongside their line manager. The passport will include statutory activities such as Gas Qualification renewals, best practice activities such as Housing Law updates and department-driven activities such as Customer Services training. Every year the L&D budget is developed around the requests from the department managers however, at the end of the financial year there is often a large underspend as several training requests were not pursued by the department; the Passport to Work scheme will encourage all training required to be completed in order to maintain their passport. The scheme will evoke more conversations around development between line manager and the individuals and could lead to more opportunities for personal development.



Signed:

Name: Joanne Thomas

Position: People Advisor

**From:** Lleucu Powel  
**To:** Kate Houston  
**Subject:** RE: i2i to discuss coaching and mentoring opportunities  
**Date:** 16 January 2020 13:37:45  
**Attachments:** image001.png

---

Hi Kate,

Sounds like a good idea. I will put this on the agenda for the next i2i meeting so that we can discuss.

I'll let you know what everybody's thoughts are.

Many thanks,

**Lleucu**

|                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p><b>Lleucu Powel</b> • Hospital to a Healthier Home Caseworker<br/> <a href="mailto:lleucu.powel@wwcr.co.uk">lleucu.powel@wwcr.co.uk</a><br/> 07930 010082<br/> <b>Gofal a Thrwsio Gorllewin Cymru</b><br/> <b>West Wales Care &amp; Repair</b><br/> 01437 766717<br/> Meyler House, St. Thomas Green,<br/> Haverfordwest, Pembrokeshire, SA61 1QP<br/> <a href="http://www.wwcr.co.uk">www.wwcr.co.uk</a></p> |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

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**From:** Kate Houston [mailto:Kate.Houston@atebgroup.co.uk]  
**Sent:** 15 January 2020 10:23  
**To:** Lleucu Powel  
**Subject:** i2i to discuss coaching and mentoring opportunities

Hi Lleucu

Please can you discuss at the next i2i meeting the possibility of cross-sector mentoring with other housing associations. I believe this would be a good networking opportunity for ateb employees who wish to expand their career in this field or wish to up-skill.

I understand that we have not formally trained team leaders, supervisors and line-managers as coaches or mentors however, many of them have been on OPSIS training and already have a wealth of knowledge in their field. Many of them are bringing the techniques they have learnt into practice within their teams such as using probing questioning, actively listening and providing constructive feedback in the Achieve Framework. These 'soft skills' could allow us to offer our services cross-sector and in return benefit from a wealth of experience, some who may have formal qualifications as a coach or mentor.

Offering a formal programme at Ateb may not be currently viable due to workload

pressures but a programme spanning other close housing associations in Wales may benefit our employees in the short-term and take little administration.

Thanks

Kate

# Zac's Onboarding Program

**Role Profile:** RP/06/12 – People Assistant

**Team:** People & Communications

**Start date:** 02/12/2019

## Welcome Zac - we're so glad you're finally here to join the People & Communications Team to help us to create better living solutions.

Your onboarding plan has been designed to provide you with the information you need to get started in your role as People Assistant and as a member of the ateb team. Essential meetings have already been booked for you to get to know your team, wider teams and important information about ateb, such as our Vision and DNA.

The appointments below will give you structure during your first week and help guide you during your probationary period. The appointments are a foundation only and you should plan your own work and days around these – or alternatively, feel free to contact the people you're meeting to reschedule if necessary.

### Week 1

| Day 1    | Time    | Activity                                                                                                                                                                                                                         |
|----------|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 02.12.19 | 9.30am  | People team onboarding with Jo Thomas – People Advisor <ul style="list-style-type: none"><li>• Essential paperwork</li><li>• Signpost to online hub and policies</li><li>• Salary &amp; expenses</li><li>• Trust Clock</li></ul> |
|          | 10.30am | Health & Safety onboarding with Seamus Doyle – Health, Safety & Regulation Manager <ul style="list-style-type: none"><li>• H&amp;S policies</li><li>• Lone working</li><li>• DSE</li></ul>                                       |
|          | 11.15am | GDPR onboarding with Julie John – Governance Coordinator.                                                                                                                                                                        |
|          | 11.30am | Tour of Meyler House with Jo Thomas                                                                                                                                                                                              |
|          | 12.00pm | Lunch                                                                                                                                                                                                                            |
|          | 1.00pm  | Local onboarding with line manager, Victoria Evans – People & Communications Manager <ul style="list-style-type: none"><li>• Meet and greet</li><li>• Discuss department service needs</li><li>• Discuss policies</li></ul>      |
|          | 3.00pm  | Meet the People & Communications Team and Governance Team.                                                                                                                                                                       |

| Day 2    | Time    | Activity                                                                                                                                                                            |
|----------|---------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 03.12.19 | 10.00am | ICT onboarding with Lyndsey Dafoe – Service Desk Analyst                                                                                                                            |
|          | 11.30am | Meeting with Suzanne Hobday – Finance Officer <ul style="list-style-type: none"> <li>• Discuss pension and Simply Health scheme</li> <li>• Provide new starter checklist</li> </ul> |
|          | 1.30pm  | Meet your workplace buddy – Debbie Yates, Governance Assistant                                                                                                                      |
|          | 3.30pm  | Review role profile with Victoria                                                                                                                                                   |
| Day 3    | Time    | Activity                                                                                                                                                                            |
| 04.12.19 | 10.00am | People team onboarding with Jo Thomas <ul style="list-style-type: none"> <li>• People &amp; Communications policy session</li> </ul>                                                |
|          | 11.30am | Shadow Kate Houston                                                                                                                                                                 |
|          | 1.30pm  | Discuss and develop onboarding objectives with Victoria                                                                                                                             |
| Day 4    | Time    | Activity                                                                                                                                                                            |
| 05.12.19 | 10.30am | Get to know Customer Services with Jane Nutland – Contact Centre Coordinator                                                                                                        |
|          | 2.00pm  | What's our Vision and DNA?                                                                                                                                                          |
|          | 4.00pm  | Complete the Equality & Diversity e-learning module (Passport to Work)                                                                                                              |
| Day 5    | Time    | Activity                                                                                                                                                                            |
| 06.12.19 | 10.00am | Get to know Property Services with Julie Edwards – Administrator.                                                                                                                   |
|          | 1.00pm  | Shadow Jo Thomas                                                                                                                                                                    |
|          | 3.00pm  | Take five minutes to check you've returned necessary documents                                                                                                                      |

## Week 2

| Day 1    | Time    | Activity                                                                                                                                     |
|----------|---------|----------------------------------------------------------------------------------------------------------------------------------------------|
| 09.12.19 | 9.30am  | Get to know the Older Person's Services with Amy Williams – Senior Scheme Manager, at De Clare Court, Haverfordwest.                         |
|          | 10.30am | What are Role Profiles and Service Hubs? With Victoria.                                                                                      |
| Day 2    | Time    | Activity                                                                                                                                     |
| 10.12.19 | 10.00am | Get to know West Wales Care & Repair, with Scott Nash – Senior Technical Officer.                                                            |
|          | 12.00pm | Shadow Kate                                                                                                                                  |
|          | 3.00pm  | Complete the GDPR e-learning module (Passport to Work)                                                                                       |
| Day 3    | Time    | Activity                                                                                                                                     |
| 11.12.19 | 10.00am | Meet with Debbie, your workplace buddy.                                                                                                      |
|          | 1.30pm  | Get to know Mill Bay Homes with Matthew Owens – Operations Manager                                                                           |
| Day 4    | Time    | Activity                                                                                                                                     |
| 12.12.19 | 10.30am | Get to know Maintenance & Compliance with Colin Groves – Maintenance Supervisor, and Linzi Laugharne – Maintenance & Compliance Coordinator. |
| Day 5    | Time    | Activity                                                                                                                                     |
| 13.12.19 | 10.00am | Get to know the Engage service with Ali Evans – Engage Coordinator                                                                           |
|          | 12.30pm | Shadow Jo Thomas                                                                                                                             |
|          | 3.00pm  | Complete your first Achieve 121 and barometer with Victoria                                                                                  |

## Week 3

| Day 1    | Time    | Activity                                                                             |
|----------|---------|--------------------------------------------------------------------------------------|
| 16.12.19 | 9.30am  | What is Involve to Improve (i2i) with Lleucu Powel – i2i Chair                       |
| 16.12.19 | 11.30   | Discuss Passport to Work with Victoria Evans                                         |
| Day 2    | Time    | Activity                                                                             |
| 17.12.19 | 10.00am | Find out more about the Vision and supporting documents with Victoria                |
| Day 3    | Time    | Activity                                                                             |
| 18.12.19 | 10.00am | Meet with Debbie, your workplace buddy.                                              |
| Day 4    | Time    | Activity                                                                             |
| 19.12.19 | 10.30am | Get to know Customer Support with Karen Holroyd – Area Officer.                      |
| Day 5    | Time    | Activity                                                                             |
| 20.12.19 | 10.00am | Get to know the Get Connected project with Tom Waters – Digital Support Coordinator. |

## Week 4

Contact the relevant teams to get this booked in.

### Activities to engage in

- Meet Debbie, your workplace buddy
- Complete your onboarding review with Kate from the People & Communications Team
- Achieve 121 and barometer with Victoria, and discuss any development needs

## Month 2

Contact the relevant teams to get this booked in.

### Activities to engage in

- Achieve 121 and barometer with Victoria, and discuss any development needs
- Study tour with relevant colleagues – visit development sites, a void and estate etc.
- People team onboarding review
- Speak to other teams about the Vision and DNA

## Month 3

Contact the relevant teams to get this booked in.

### Activities to engage in

- Achieve 121 and barometer with Victoria, and discuss any development needs
- Review Role Profile
- Health & Safety onboarding review
- Discuss the Vision's supporting documents

## Month 6

Contact the relevant teams to get this booked in.

### Activities to engage in

- Achieve 121 and barometer with Victoria, and discuss any development needs
- Discuss next steps following your probationary period

## Objectives to complete during your onboarding period

During your first week, you and Victoria will discuss, develop and agree some objectives for you to complete during your onboarding period. These objectives will be realistic and help you explore your role and responsibilities and how you contribute to ateb's organisational objectives.

|                        |  |
|------------------------|--|
| Complete by<br>Month 1 |  |
| Complete by<br>Month 3 |  |
| Complete by<br>Month 6 |  |

## FAQs

### **Q: Where can I find further onboarding materials?**

A: You will be provided with some onboarding materials during your People team and department onboarding session. However, we have a dedicated onboarding Yammer group where you can find all the onboarding documents you will need. Head over to Yammer and start the following the group.

### **Q: I'm confused by Trust Clock – what time do I start and finish work?**

A: The flexibility of the Trust Clock allows you to organise your own working hours in line with our Leading Principle, to focus on outcomes. However, don't forget to discuss your working plans weekly with your line manager to ensure your plans meet the Leading Principle.

### **Q: What is the Leading Principle?**

A: The Leading Principle is the foundation of our Trust Clock which everyone should refer back to.

*"We must always put the customer, business, team and H&S first when planning and delivering our role profile responsibilities and service area outcomes".*

### **Q: I've heard a lot about the employee representative group (i2i) and the great achievements they've made. How can I get involved?**

A: i2i welcomes always welcomes new members from all areas of ateb. However, if you can't find the time to commit long-term, you are welcome to attend on an ad-hoc basis or speak to an i2i representative with your ideas and suggestions.

### **Q: How do I contribute to the tea/coffee fund?**

A: We provide tea, coffee and hot chocolate free of charge. Boiling and chilled water and fresh milk are available in both kitchens to make your refreshments. Help yourself!

### **Q: I have a medical appointment during working hours – what should I do?**

A: We care about our team members therefore, we are happy for team members to attend their medical appointments during working hours without 'paying' back the hours. Chat to your line manager about your appointment date/time.

### **Q: I am experiencing a difficult time and worried about my mental health – what should I do?**

A: We are always here to support our team members during difficult periods. We encourage you to speak to your line manager or the People Team so we can discuss how we can support you. We also provide six free confidential sessions with a local independent counsellor.

## **Coaching and Mentoring within Ateb**

### **Summary of findings:-**

Overall, respondents stated there are no formal arrangements offering coaching and mentoring therefore they have not experienced being coached or mentored themselves in a formal setting. Some respondents have been mentored informally via colleagues as and when required. Respondents recognise this as an area which Ateb will endeavor to encourage going forward to ensure a solution based organisation and many of them would have accessed coaching and mentoring if offered.

Coaching and mentoring could be offered to retain employees, for succession planning and in positions which are harder to fill such as within the maintenance teams.

Respondents such as team, leaders, supervisors and managers recognise that through OPSIS training elements of coaching have been touched upon and can see this style of coaching being effectively utilised via such conversations.

Team leaders, supervisors and managers believe they have the necessary skill and experience but lack confidence therefore would prefer formal training before offering their services. Time and workload pressure were cited as a potential barrier.

One of the respondents is a qualified coach and recognises that a formal coaching and mentoring programme could be difficult to operate, it was also noted that there is limited resources and confidentiality and biases could be applied if operated in-house.

Overall, respondents recognised that the Achieve Framework is moving towards a coaching culture at Ateb however, due to the Achieve Framework not being properly launched not all employee across the Group are benefiting and understanding the process. It was stated that it is seen as management tool to set and track targets primarily used as a performance management tool therefore the bigger picture of coaching conversations is being missed.

### Coaching and Mentoring - Recommendations

| Recommendations to consider                                                                                                                                                                  | By Whom                                                             | When                 | Comments                                                                                                                                                                                                                                                                                  | Completed date |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| To include mentoring and coaching models in the Achieve Framework.                                                                                                                           | People Team                                                         | Oct-20               | On completion of OPSIS training gather resources to be included in the Achieve Framework                                                                                                                                                                                                  |                |
| To carry-out recommendations established by the auditor on the Achieve Framework.                                                                                                            | People Team                                                         | End of April 2020    | To revise Achieve Framework based on Auditors comments                                                                                                                                                                                                                                    |                |
| To roll-out corporate training to team leaders, supervisors and managers on Achieve Framework, SMART objectives, holding 1:1's, providing constructive feedback aligned with coaching ethos. | People Team                                                         | May-20               | The Achieve Framework content needs to be agreed                                                                                                                                                                                                                                          |                |
| To actively promote coaching and mentoring at regular intervals across all job roles.                                                                                                        | People Advisor - Kate Houston/Communication Assistant - Poppy Kucyj | March 2020 onwards   | Find posters to encourage take-up, share success stories, regularly promote coaching and mentoring and direct employees to SharePoint page. To ensure all new employees are using the Onboarding Programme utilising the workplace buddy, signposting buddies to free self-help resources | Ongoing        |
| To design a coaching and mentoring hub such as SharePoint.                                                                                                                                   | People Advisor - Kate Houston                                       | End of February 2020 | To design contracts, actions plans, reflection, recognition and evaluation templates together with models and techniques.                                                                                                                                                                 | 28-Feb-20      |
| To consider cost implications and benefits of up-skilling team leaders, supervisors and managers: either by offering ILM qualifications or in-house management training.                     | People Team                                                         | May-20               | Consider opportunities to widen take-up of coaching and mentoring                                                                                                                                                                                                                         |                |
| To encourage a greater take-up of new starters during their probationary period to actively engage in mentoring.                                                                             | Joanne Thomas - People Advisor                                      | Jan-20               | Onboarding revamp                                                                                                                                                                                                                                                                         | Jan-20         |
| To explore weak areas such as within the maintenance team targeting new employees which can only benefit Ateb (Valluriblog, 2018).                                                           | People Team                                                         | Apr-21               | To align with further strategies relating to succession planning                                                                                                                                                                                                                          |                |
| To offer peer-to-peer mentoring programme to those seeking professional growth as an effective succession planning technique.                                                                | People Team                                                         | Jun-20               | Encourage in-house take-up                                                                                                                                                                                                                                                                |                |
| To offer peer-to-peer mentoring to attract and retain employees utilising advance learning and development to disseminate skills which are in demand (Mentorloop (ND)).                      | People Team                                                         | Jun-20               | Once organisational mentoring and coaching are common start to offer this as a benefit when recruitment                                                                                                                                                                                   |                |
| To encourage cross-sector mentoring partnership with housing associations to increase skills and provide career progression.                                                                 | People Team                                                         | Jun-20               | Encourage collaborative working sharing knowledge, skills and resources                                                                                                                                                                                                                   |                |
| To survey all employees ascertaining who would be mentors or coaches in the workplace.                                                                                                       | People Team                                                         | Apr-21               | When practices are well established and a few employees are demonstrating coaching and mentoring in the workplace to survey employees. Once numbers of employees are identified roll-out a formal programme                                                                               |                |
| To survey all employees ascertaining who wished to be coached or mentored in the workplace.                                                                                                  | People Team                                                         | Apr-21               | When practices are well established and a few employees are demonstrating coaching and mentoring in the workplace to survey employees. Once numbers of employees are identified roll-out a formal programme                                                                               |                |

**From:** Victoria Evans  
**To:** Kate Houston  
**Subject:** Re: Coaching and Mentoring Recommendations  
**Date:** 16 March 2019 13:03:56

---

Hi Kate

Thank you for this, your results were interesting. Yes, please go ahead and create a SharePoint page as a starting point hopefully in the future we will have resources and the time to implement a lot more going forward in 2020/21.

Tori

Get Outlook for iOS

---

**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>  
**Sent:** Tuesday, March 17, 2020 09:59:56  
**To:** Victoria Evans <Victoria.Evans@atebgroup.co.uk>  
**Subject:** Re: Coaching and Mentoring Recommendations

Hi Tori

Following holding 1:1's with a selected group of employees and asking them to complete a few questions by email, I have compiled recommendations to assist in developing coaching and mentoring at ateb.

From these recommendations I have taken two points to action, which I have attached in order to start promoting coaching and mentoring which I feel could be implemented swiftly.

Thanks.

Kate.

### Coaching and Mentoring - Action Plan

| Action required                                                                       | By Whom      | When                 | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Completed date |
|---------------------------------------------------------------------------------------|--------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| To design a coaching and mentoring SharePoint page                                    | Kate Houston | End of February 2020 | This should be an area for employees to self-help and motivate one another. No costs are associated with any of the resources on this hub and can be used in variety of ways from 1:1 conversations, through the Achieve Framework or used more formally. Model templates models like JOHARRI WINDOW, OSCAR, GROW and Gibb's can be inputted together with useful information to assist in the coaching and mentoring process together with useful techniques such as powerful questions, empathic listening, how to provide and receive feedback etc... I will include contracts, actions plans, reflection, recognition and evaluation templates with ateb's logo | 28-Feb-20      |
| To actively promote coaching and mentoring at regular intervals across all job roles. | Kate Houston | March 2020 onwards   | On completing a SharePoint page providing resources for the coach/mentor or the coachee/mentee it is important to gain interest and motivate employees addressing and promoting coaching and mentoring in the workplace together with the benefits and barriers. I will source posters, success stories and ask the Communication's Assistant to regularly promote and direct employee to the SharePoint page.                                                                                                                                                                                                                                                      | Ongoing        |

## Benefits

### Coachee

- Define your own goals
- Build and improve specific skill-sets
- Personal development
- You become self-reliant
- You take greater accountability for your actions
- Increase productivity
- Become better at communicating
- Increase engagement
- Provides a safe place to gain perspective
- Build personal awareness
- Build team and organizational efficiency

### Coach

- Improves relationships
- Improves job satisfaction
- Improves productivity
- Improves teamwork



# Benefits

## Mentee

- Job satisfaction
- Improves motivation
- Gain recognition
- Gain self-confidence
- Establish goals by identifying areas of development
- Develop specific skills
- Encourages self-reflection
- Learn about yourself and situations you encounter
- Develops listening skills
- You can ask questions and get answers you require
- You will learn not to accept the first answer or solution by active probing
- Further your career progression

## Mentor

- You will provide the mentee with insight into your career and work
- You will share your own knowledge and experiences
- You will offer guidance and advice such as career thinking
- You will develop your own skills and problem-solving techniques
- You will encourage self-reflection
- You will give recognition
- You will improve the mentee's self-confidence
- You will encourage development
- You will increase your own coaching skills



At Ateb we  
promise to  
combat:

EV. 21

## Barriers

### Organisational

- Lack of coaching skills
- Not seen as a priority
- Limited employee development
- Transactional rather than transformational culture
- Poor resources and budgets
- Time pressures
- Senior management buy-in
- Lack of understanding
- Relates to poor performance rather than focusing on excellence

### Personal

- Lack of time
- Lack of motivation
- Lack of trust
- Fear of failure
- Experience

### Operational

- Remote working
- Different working patterns
- Clear processes such as standardisation of models





## Are you new to ateb? These are some success stories of new employees accessing mentoring within their probationary period

*I was reluctant at first, so I said no. After a couple of months into my probationary period I started to feel that I didn't belong and started questioning whether I was good enough to do the job. My supervisor wasn't approachable, and I was getting things wrong. Mentoring helped me, it gave me confidence and I found some of exercises helpful to identify my strengths and weaknesses.*

*I was put on a PIP, I felt anxious about my future and didn't know how I could improve. I really didn't want to lose my job. Mentoring helped me to time manage my tasks, ask for help and find out what was expected from me. Work is looking a lot more positive for me now so I would recommend mentoring to anyone.*

*I had never been offered mentoring before but due to the department going through a restructure I was being pushed to take on more in my role which I wasn't happy about. I used the sessions to build my confidence, skill set and reflect on my behaviour. I hadn't realised how I was being perceived. I found the process beneficial using the sessions to increase my confidence and the skills needed to remain with ateb. I got on well with my mentor and I believe I could always go to them even now.*

*I have always trained on the job but after hiccups I decided to give mentoring a go. What a difference! I started to look at my duties and think which tasks I did well and those which I found difficult or could have approached better. With my mentor we looked at what I wanted to achieve and worked on achieving this together. It was great to have support from a more experienced colleague.*

TO BUILD A STRONG TEAM, YOU MUST  
**SEE SOMEONE ELSE'S  
 STRENGTH**  
 AS A **COMPLEMENT** TO YOUR  
**WEAKNESS**  
**NOT A THREAT**  
 TO YOUR POSITION OR AUTHORITY.

CHRISTINE CAINE

@AthleteAssess

None of us is as  
**S M A R T**  
 as all of us.  
 \* \* \* \* \*  
**WORK TOGETHER**  
**ACHIEVE MORE**



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Mentoring Contract

ateb

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This contract forms the basic agreement and commitment to the Mentoring relationship. It should be completed either the first or second meeting, a copy kept by both mentor and mentee and a copy provided to the HR team.

Mentor Details

Name

Signed (mentor/mentee)

Tel number

Mentoring Contract Template.pdf

Yesterday at 21:26

Mentoring Action Plan

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NameDate

My goals for the next 6 months are

My goals between now and the next meeting with my Mentor / Mentee are

Mentoring Action Plan Template...

Yesterday at 21:26

Reflection Sheet

ateb

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Write down the key skills, qualities and attributes of an effective mentor. Using personal reflection and feedback from others, rate yourself on how good you think you are at each skill. Consider whether you could be a mentor.

Skills - qualities that would make me an effective mentor

How do I measure up?

Reflection Template.pdf

Yesterday at 21:26

NameModifiedModified ByAdd column

5 Basic Needs\_.pdf9 minutes agoKate Houston

8 Stage Coaching Model - Route Map.pdf9 minutes agoKate Houston

8 Step Coaching Model.pdf9 minutes agoKate Houston

BLANK-Coaching-Wheel\_u.pdf9 minutes agoKate Houston

Connecting Beliefs-Values-Attitudes copy.pdf9 minutes agoKate Houston

Core Principles of Time Management.pdf9 minutes agoKate Houston

Evaluation Form.pdfYesterday at 21:26Kate Houston

Feedback .pdf8 minutes agoKate Houston

Leadership Behaviours (002).pdf8 minutes agoKate Houston

Mentoring Action Plan Template.pdfYesterday at 21:26Kate Houston

Mentoring Contract Template.pdfYesterday at 21:26Kate Houston

Recognition.pdf8 minutes agoKate Houston

Return to classic SharePoint

# Useful Websites

## Mentoring and Coaching Main Websites

<https://new.coachingnetwork.org.uk/>

<https://www.coachmentoring.co.uk/>

<https://www.coachfederation.org.uk/>

[https://www.cimaglobal.com/Documents/ImportedDocuments/cid\\_tg\\_mentoring\\_coaching\\_Aug08.pdf.pdf](https://www.cimaglobal.com/Documents/ImportedDocuments/cid_tg_mentoring_coaching_Aug08.pdf.pdf)

<https://www.cipd.co.uk/knowledge/fundamentals/people/development/coaching-mentoring-factsheet>

<https://www.coachingandmentoringinternational.org/https://emccuk.org/>

## Other Websites

<https://www.businessballs.com/coaching-and-mentoring/grow-model/>

<https://www.thebalancecareers.com/coaching-questions-for-managers-2275913>

<https://www.schoolofcoachingmastery.com/coaching-blog/bid/54576/101-incredible-coaching-questions>

## Active Listening

[https://www.cipd.co.uk/Images/effective-listening-skills-in-mentoring\\_tcm18-16957.pdf](https://www.cipd.co.uk/Images/effective-listening-skills-in-mentoring_tcm18-16957.pdf)

<https://www.mindtools.com/CommSkll/ActiveListening.htm>

<https://www.verywellmind.com/what-is-active-listening-3024343>

## Powerful questions

<https://www.forbes.com/sites/forbescoachescouncil/2018/06/21/16-powerful-questions-coaches-ask-their-clients-to-help-achieve-their-goals/#42ced90d65e0>

<https://www.davidclutterbuckpartnership.com/products-page/e-books/powerful-questions-for-coaches-and-mentors/>

<https://www.schoolofcoachingmastery.com/coaching-blog/bid/54576/101-incredible-coaching-questions>

## Mentoring toolkit

[https://www.cipd.co.uk/Images/west-yorkshire-mentoring-pack\\_2011\\_tcm18-9423.pdf](https://www.cipd.co.uk/Images/west-yorkshire-mentoring-pack_2011_tcm18-9423.pdf)

## Mentoring Process

### Introduction

Coaching elements exist within the Achieve Framework which focus on specific goals or issues. A formal mentoring scheme develops skills, knowledge and experience. It can create new ways of thinking, provide self-awareness, build confidence and assist with your career planning. It is a great way to prepare for new roles within Ateb and offer better working opportunities.

Mentoring can be intensive and short-term in order to manage people or dealing with difficult situations. Alternatively, it can be a longer-term relationship with your mentor where you learn from one another broaden skills, experiences and knowledge for your future career.

Mentoring can be via face-to-face, email or undertaken using Skype, therefore location need not be a barrier. Working collaboratively cross-sector could occur.

### Desired Outcomes

- To broaden knowledge of the business
- To share ideas and best practice across Ateb's Service Areas
- To increase internal promotions
- To assist with succession planning
- To improve staff retention by satisfying staff development aspirations

### The Benefits of Mentoring

#### **Mentee Benefits**

- ✓ Improved morale
- ✓ Increased job satisfaction
- ✓ Improved confidence
- ✓ Increased motivation
- ✓ Improved self-awareness
- ✓ Identified strengths/weaknesses
- ✓ Improved knowledge of other areas of the business
- ✓ Career development and progression

#### **Mentor Benefits**

- ✓ Recognised/valued as a role model

- ✓ Provides challenges by working on other issues for which they do not have responsibility for
- ✓ Provides satisfaction from supporting/developing someone
- ✓ Shares good practice
- ✓ Learning from mentee's experiences

## **Mentor qualities**

Mentor's will need to be committed to the process displaying: -

- a positive attitude
- willingness to challenge and be challenged
- self- belief
- self-awareness
- personal integrity
- a drive for improvement
- openness and honesty

## **Expectations from Potential Mentees**

Individuals who wish to participate in the mentoring scheme should: -

- know what they want to achieve during the mentoring period
- have a positive attitude
- be open and honest
- be willing to challenge and be challenged
- be prepared to take responsibility for arranging mentoring meetings

## **Training**

Depending on skill level an external training course may be offered alternatively internal coaching will be offered by an accredited coach.

## **Administration of the Mentoring Scheme**

The HR team will assist with administration and the matching process. If required training will be provided to mentors.

## **Selection Process**

### **Mentors**

- Apply by expressing your interest to the HR team.

## Mentees

- Speak to your line manager
- Contact the HR team

## Matching Mentees to Mentors

Where possible at least two mentors will be offered which the HR team feel are appropriate they will have the right skills, experience, behaviours and knowledge to assist.

## Mentoring Relationship and Process

**Initial Meeting** – The following should take place during the initial meeting:

- ✓ The Mentoring Contract is completed.
- ✓ The Mentoring Action Plan is formulated this will determine frequency/duration of meetings, anticipated duration of mentoring relationship

*Note - from this point the relationship is managed between the mentor/mentee*

## Evaluation

Mentees will be expected to complete an evaluation questionnaire on completion of the mentoring programme, this will assist in ensuring the mentoring programme is effective.



# Mentoring Contract

This contract forms the basic agreement and commitment to the Mentoring relationship.

It should be completed within the first or second meeting, a copy kept by both Mentee and Mentor and a copy provided to the HR Team

| Mentor Details           |  |
|--------------------------|--|
| Name                     |  |
| Agreed contact method    |  |
| Tel number               |  |
| Email                    |  |
| Agreed times for contact |  |

| Mentee Details           |  |
|--------------------------|--|
| Name                     |  |
| Agreed contact method    |  |
| Tel number               |  |
| Email                    |  |
| Agreed times for contact |  |

| Agreed details of Mentoring Relationship            |  |
|-----------------------------------------------------|--|
| Frequency of meetings                               |  |
| Duration of meetings                                |  |
| Venue for meetings                                  |  |
| Cancellation procedure                              |  |
| Style of mentoring                                  |  |
| Limits of the relationship /<br>Personal boundaries |  |
| Any other information (incl<br>medical, etc)        |  |

By signing this document I am committing to make the CIPD mentoring relationship and programme work

**Mentee**

Signed ..... Date .....

Print Name .....

**Mentor**

Signed ..... Date .....

Print Name .....

# Mentoring Action Plan

Name:..... Date: .....

My goals for the next 6 months are:

|  |
|--|
|  |
|--|

My goals between now and the next meeting with my Mentor / Mentee are:

|  |
|--|
|  |
|--|

The practical steps to achieve these are:

| Action | By whom | By when |
|--------|---------|---------|
|        |         |         |

How will I know when I have achieved my goal?

| Review Date | Comments on progress |
|-------------|----------------------|
|             |                      |

## Core Principles of Time Management:

---

Managing your time successfully implies accomplishing what is most important for you. When you don't accomplish what you truly want, you may feel confused, compromised, and frustrated. Many people try to use time management techniques that work for others, only to be disappointed. Often this is because they don't also identify the goals most important to them and gear the techniques toward those goals. Effective time management must include techniques for good prioritizing

### **MYTHS ABOUT TIME MANAGEMENT:**

Before exploring specific time-management techniques, consider several common myths which contribute to poor time management, especially undermining your efforts to establish and follow your priorities:

**MYTH:** My life is completely controlled by external events.

**FACT:** You can have some control over many aspects of your life, but you and you alone are responsible for initiating that control. Learn to recognize what you can and can't control before making your choices. Anticipate the future and clarify the external demands that must be faced. From there, it is easier to determine what can be done, and within what time frame, despite the demands.

**MYTH:** I should meet everyone's expectations.

**FACT:** The needs and demands of others may be inappropriate for you and your lifestyle. They may be poorly timed, highly questionable, or simply unattainable. They may be of a different priority than your own. By trying to meet the expectations of others, you may be short-changing yourself and your needs. First become clear about what your needs are and then you consider what others expect of you.

**MYTH:** I should have no limits.

**FACT:** We all have limits . . . failure to acknowledge this may cause you to become perfectionistic in your expectations. Perfectionists are especially prone to procrastination because the perfection they demand is impossible. For example, no paper will ever be perfect in all ways. The immediate consequence of turning in an imperfect paper may be brief, acute anxiety, but

## **Giving and Receiving Feedback**

### ***An Interpersonal Skill***

---

The process of giving and receiving feedback is one of the most important concepts for inspiring individual growth and developing teamwork. Through feedback, individuals get to know how other people see them and they can then make different choices about their behaviour. Giving feedback effectively implies certain key ingredients: caring, trusting, acceptance, openness and a concern for the needs of others. Thus how evaluative, judgmental or helpful feedback is may depend on the personal philosophy of the individuals involved. Nevertheless, giving feedback is a skill which can be learned and developed, and for which certain useful guidelines exist.

Giving feedback is a verbal or non-verbal process through which an individual lets others know his perceptions and feelings about their behaviour. When soliciting feedback, an individual is asking for others' perceptions and feelings about his own behaviour. Most people give and receive feedback daily without being aware of doing so. One purpose of training is to increase the awareness of this process so that it can be entered into intentionally to optimise individual growth and team functioning.

The feedback exchanges should focus on the individual's behaviour and the effect it has on others, rather than the individual's intentions. It is important, however, for the individual to feel responsible for both his intentions in the communication and the actual effect he gets with others.

Here are some guidelines for giving and receiving feedback to optimise its value.

### ***Responsibility for Feedback:***

It is important for the giver of the feedback to feel responsible for both his intentions for giving the feedback and for the effect the feedback has on the other person. The effect achieved is the key focus and needs careful communication and sensitivity to achieve it. The receiver of the feedback must also feel responsible for his reaction to the feedback and not blame it on the giver.

### ***Indirect vs Direct Expression of Feelings:***

When Mary states that George is an insensitive person, she is expressing her feelings indirectly. If she said: "George, when you do that I feel angry", she is

## Recognising Contributions:

---

Effective leaders **cause recognition to grow** and **flow freely**. This workshop is an ideal opportunity to practice giving and receiving recognition.

Stretch your ability to notice the achievements and progress of others.  
Encourage and energise people by communicating that you notice them.  
Enjoy receiving recognition, credit and incentive for your own contributions.

### What Actions Can to be Recognised?

***Any act which advances the excellence or integrity of a person or a group of people***

**Individual Progress.** Notice people who achieve something new, for example: meet a personal objective, conquer a fear, eg presenting to a group, challenge their own traditional patterns of thought or emotions, act on a value or a new behaviour.

**Group Contributions.** Notice people who help the team in the course - eg people who: listen and communicate well, encourage others, invent ideas or options, elevate team morale or standards, reduce tension, help the group to reach agreement, find or share resources, lead or follow appropriately, clarify decisions, help the group to succeed.

**Personal Contributions.** Notice people who help or inspire **you**, especially if the result is to increase your own ability, confidence or satisfaction.

**Creative Mistakes.** Notice people who attempt new actions or behaviours, even if they do not fully succeed - especially if they have a positive impact on you or others - for example: lateral thinking or fresh ideas, low-cost experiments which could result in a breakthrough, attempts from which something valuable is learned, partial solutions or milestones on the way to success.

### How Can You Recognise People?

***Notice what they do and tell them***

You may tell the person in private. You may acknowledge him or her in public. You may write a note. Find your own moment, or use the schedule times for recognition.

Be clear. Recall the action and be explicit about what you are recognising. For example, "Thank you for offering a third option when Paul and I were at impasse", is much clearer than saying, "Thank you for what you did this afternoon".

# Reflection Sheet

Note down the key skills, qualities and attributes of an effective mentor.

Using personal reflection and feedback from others, rate yourself on how good you think you are in each area.

Consider whether you could be a mentor.

[illegible]

## The 8 Stage Coaching Model – A Route Map

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### Step 1 - Agree - Is coaching is the right option?

---

### Step 2 - Assessment – (understand the context)

Overview of current situation / circumstances by asking open style questions  
 Demonstrate active listening / summarise and test understanding  
 Build rapport with the learner

**S**

### Step 3 - Exploration – (of problems / opportunities)

What's gone well so far and why?  
 What hasn't gone well so far and why? (problems / difficulties)  
 What are the effects / implications of these problems / difficulties?  
 What would the benefits be for you / team / organisation if these problems / difficulties were overcome?

**P**

**I**

**N**

### Step 4 - Goal Setting – (building on Step 3)

Set and define goals – what are you trying to achieve  
 What will the outcomes look like if you achieve your goal?

### Step 5 - Initiate Options – (help learner to initiate options to achieve Step 4)

What actions need to happen to achieve step 4?  
 What will be happening that isn't happening now?  
 What behaviour would the learner be demonstrating to achieve Step 4?  
 What range of alternative options are there to achieve Step 4?  
 (wherever possible these suggestions should come from the learner, not the coach.)

### Step 6 - Evaluate Options – (most suitable options from Step 5?)

Explore the most suitable option from Step 5  
 Why is this the most suitable option?  
 What will the outcome look like?  
 (wherever possible these suggestions should come from the learner, not the coach.)

### Step 7 - Action plan – (how will the most suitable option/s be implemented?)

Gaining commitment from the learner relating to:  
 Plan – Do - Check – Act to enable Step 6 to be achieved.

---

### Step 8 – Encourage Momentum – ongoing process to help learner stay on track

NB – The PULL influencing style should be applied during this coaching process

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## The 8 Step Coaching Model

Which ideas, models and processes do executive coaches use?

Are they the best-kept trade secrets of people who prefer to produce results as if by magic? Or are models and processes used in a manner that is transparent for individuals and shows them what coaches actually do and to involve them in the process?

Can these ideas and processes be used by managers in everyday situations that need something more than the normal approach?

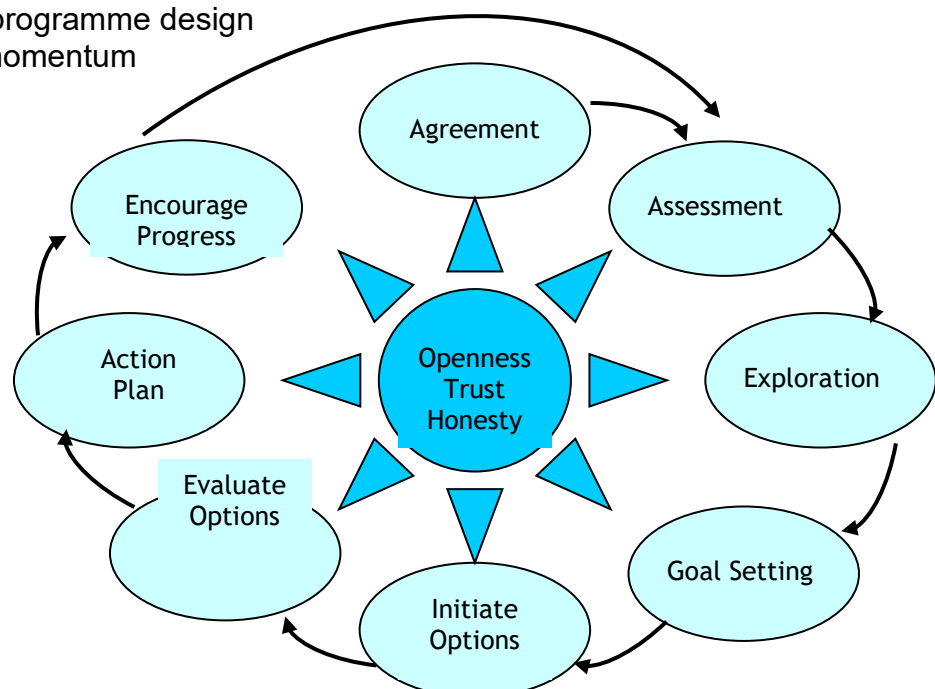
Transparency increases trust. This is essential for any coaching relationship. Without trust the person being coached holds back and does not reap the full benefits of the coaching relationship.

It is apparent that amongst the most successful and effective coaches there are similarities in the ways in which coaching interventions are conducted. From our experience and study of coaching models we developed the eight step Coaching Model.

As we stated above the development of a coaching relationship in a systematic manner should follow a number of prescribed steps:

### The 8 Step Coaching Model

1. Agree that coaching is appropriate
2. Understand the context
3. Creative brainstorming of alternatives to current situation
4. Hone goals
5. Initiate options
6. Evaluate options
7. Valid action programme design
8. Encourage momentum



## OSCAR Model



**From:** Bethan Elliott  
**To:** Kate Houston  
**Subject:** RE: Following our conversation this may help you....  
**Date:** 02 March 2020 15:45:39

---

Thanks Kate – that scenario is really helpful and I can relate this back to what we discussed and will put this into practice. Thank you for your help with this.

Beth

**Bethan Elliott**  
**Finance Officer (Payments & Collections)**



Tel | [01437 763688](tel:01437763688)

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 Haverfordwest, Pembrokeshire, SA61 1QP  
[atebgroup.co.uk](http://atebgroup.co.uk)



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhowch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

---

**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>  
**Sent:** 02 March 2020 12:18  
**To:** Bethan Elliott <Bethan.Elliott@atebgroup.co.uk>  
**Subject:** Following our conversation this may help you....

Hi Beth

Following our conversation regarding one of your team I thought this scenario may be beneficial:-

## Empathic Listening Example

As a manager, John prides himself on being there for his team members, and he maintains an open-door policy. He feels that he knows each team member quite well and regularly engages in "personal" conversations with them, staying up to date with the events in their lives, both at work and outside of work.

Recently, he noticed Natalie pulling away from the team. During meetings, she seems distracted and no longer provides the high level of input that the team has come to expect from her.

Other team members have also noticed that she's not looking too well. She was late for her meetings yesterday, which was unlike her, and she seems less interested in work more generally, too.

John approaches Natalie to ask if something is wrong. But she becomes defensive and says, "Why do you ask?" and, "I'm fine."

A few more weeks go by and, still not satisfied with her performance, John continues to become more concerned for Natalie. Previously, she'd been the backbone of a thriving team.

To get to root of the issue, John uses empathic listening techniques to discover the source of Natalie's uncharacteristically poor work performance.

## Empathic Listening Techniques

John calls Natalie into his office and simply asks her how he can help. This lowers her defenses and shows that he's willing to support her. Then, he listens to what Natalie says (as well as what she doesn't say), and takes care to avoid interrupting. It's not long before he uncovers the problem: Natalie has been going through a divorce and [taking care of an ill parent](#) at the same time.

During their conversation, John acts as a mirror to Natalie. He repeats the points that she's made, so she knows that he understands. He rephrases her comments into questions during pauses in the conversation and asks for further input from her.

John pays attention to Natalie's body language, too. Interestingly, throughout the conversation, this usually confident person kept her head and eyes down. Overall, she seemed defeated.

## Counseling and Support

After allowing Natalie to finish, John provides support without judgment. He offers to temporarily lighten Natalie's workload, and reassures her that her responsibilities will be waiting for her when she's ready to return to normal. John also makes Natalie aware of the support and resources that are available to her through the company's HR department, such as counseling and financial planning.

Crucially, John keeps the conversation to himself. He lets Natalie know that what she has said will stay between them. He encourages Natalie to keep him updated on the situation and allows her time to go to the counseling sessions that she plans through the company's HR department.

John took note of Natalie's obvious pain and listened empathically. The result: Natalie took just over a month to get better and when she returned at full speed, her work was better than ever – as was her focus, and her loyalty to John, to the team, and to the company.

## Key Points

The role of an empathic listener is to be supportive, kind and caring.

Listen carefully and without judgment. Interject occasionally to show that you've understood what's being said. Where appropriate, repeat key phrases to encourage the speaker to open up.

Pay attention to what's **not** being said, too. Take note of the speaker's emotional state, their tone of voice, and their body language.

And, when you successfully win their trust and confidence, make sure that you respect it.

Let me know how you get on with the employee and whether you need further assistance/support in handling this situation.

Thanks.

Kate

**From:** Bethan Elliott  
**To:** Kate Houston  
**Subject:** Powerful questions  
**Date:** 09 March 2020 15:15:42

---

Thanks Kate – that scenario is really helpful and I can relate this back to what we discussed and will put this into practice. Thank you for your help with this.

Beth

**Bethan Elliott**  
**Finance Officer (Payments & Collections)**



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Mae'r e-bost hwn, ac unrhyw atodiad, ar gyfer y defnyddiwr yn unig. Mae unrhyw ddosbarthiad, defnydd neu atgynhyrchiad arall heb ganiatad yr anfonwr yn flaenorol heb ei awdurdodi. Os byddwch yn derbyn y neges hon mewn gwall, rhwch wybod i'r anfonwr ar unwaith a dileu'r neges o'ch cyfrifiadur. Mae grwp cyfyngedig ateb yn gymdeithas gofrestredig gyda'r FCA, Reg. Rhif 23308R, landlord cymdeithasol cofrestredig gyda Llywodraeth Cymru, Reg. Dim PO72 ac mae'n aelod o Gymuned Tai Cymru.

---

**From:** Kate Houston <Kate.Houston@atebgroup.co.uk>  
**Sent:** 09 March 2020 11:12  
**To:** Bethan Elliott <Bethan.Elliott@atebgroup.co.uk>  
**Subject:** Powerful questions

Hi Beth

Following our conversation please find attached a link to powerful questions this should help when undertaking your 1:1's:-

<https://www.alchemyformanagers.co.uk/topics/fmvhGges2FwU88Hh.html>

Thanks.

Kate

Mentoring session: [REDACTED]

Date: [REDACTED]

Main points discussed:

Really happy with her new job and feels she fits in well within the existing team. [REDACTED] is an outgoing person and therefore isn't afraid to ask when she doesn't know. [REDACTED] feels she is a pretty straight person and cannot envisage any issues within the team. She is working well with [REDACTED], her Area Officer.

[REDACTED] has already dealt with some challenging circumstances; this hasn't put her off. [REDACTED] used her common sense when her knowledge levels haven't been high enough. [REDACTED] display's a can do attitude and will continue to learn on the job.

- Strengths: Ability to interact at all levels with tenants/colleagues, Confident, Straight Talking, her "Can Do" attitude.
- Weaknesses: Over powering workload
- Pre-planned training devised by [REDACTED] and [REDACTED]:

**Within First Month**

CSA shadowing/IBS – Completed. Please see note below regarding shadowing.

Voids Management – Only completed one so far but has another one coming up. May require further training as and when a void occurs.

Mutual Exchange – Again completed one. More training envisaged.

Tenure and tenancy differences – Not achieved.

Tenant Alteration Request – [REDACTED] understands the processes for a change of name i.e. obtain marriage certificate or when ending a tenancy i.e. asking the tenant to put their request in writing.

Anti-Social Behaviour – Not achieved.

SX3 Northgate (Anita Rogers) – Successfully completed and does not require further training.

Inputting CH@P Applications – Successfully completed and does not require further training.

Mentoring session: ~~Louise - Matthew~~

Date: ~~24/05/2020~~

Main points discussed:

~~Louise~~ feels very at home with the Association and Mill Bay Homes. Everyone has been very welcoming, her direct work colleagues especially.

~~Louise~~ is an outgoing person and therefore isn't afraid to ask when she doesn't know something. ~~Louise's~~ workload isn't very full at present and ~~Louise~~ has to find things for her to do. ~~Louise~~ is eager to adapt her role she has already started asking ~~Matthew~~ for tasks to do in order to relieve pressure on him. He has seemed hesitant and has continually checked she had completed the tasks set. ~~Louise~~ hopes in the future when trust has been built up this relaxes and goes some way to defining her future job role.

~~Louise~~ couldn't identify any training needed at present. She is happy with her job description and there were no more matters to discuss relating to training. I have asked her to speak with ~~Matthew~~ regarding what training had already been identified by her previous job role holder and budgeted for with Mill Bay Homes. It could be that ~~Louise~~ may benefit from this in future.

The job role at present doesn't extend itself to any challenging situations at present.

I have mentioned the potential issue of future lone working on the different sites. I have asked her to ensure she speaks with her team (policies and procedures) and if needed ~~Benny Davies~~, H & S Manager.

No work shadowing was identified.

- Strengths: Wealth of experience in administration roles, people pleaser, upbeat attitude.
- Weaknesses: None
- On the job training – N/A

Action Agreed: Louise has no issues therefore she is happy not to continue with mentoring. Louise does know that should her situation change she will be able to contact HR.

Date of Next session: N/A

Preparation for next session : N/A

**From:** [Evelyn Calveley](#)  
**To:** [Kate Houston](#)  
**Subject:** Statement  
**Date:** 02 April 2020 16:27:32

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Kate has mentored myself on a few occasions namely when I lack in confidence in work. The most recent time that she mentored me was when there was quite a few changes happening in work and changes to everyone's job titles and job roles. I had a lack of confidence in myself and the changing of one job to another. My job role was due to change quite considerably compared to the role I was in previously but talking to Kate about it helped. She helped me to see that change is not always a bad thing and that she was always there to help. She listened to my concerns regarding the changes and helped me find ways to approach my Line Manager with any concerns that I had.

## **Gibb's Reflective Cycle – utilised to mentor an employee**

### **Step 1 – Description**

A fairly new employee continually looked harassed when seeing them around the office. I therefore approached the employee and asked if they were ok. They were visibly upset. I used the Gibb's model, typing up my notes afterwards to capture the conversation.

**Questions I asked were:-**

**I asked what had happened, what was the matter?**

The employee felt overwhelmed – they felt anxious and nervous as they had a number of tasks to complete and didn't feel they had enough time and experience to cope with what was being asked.

### **Step 2 – Feelings**

**Questions I asked were:-**

**What did you feel before this situation took place?**

Felt uncomfortable in own abilities as hadn't worked in a finance office for a number of years. Was not use to working on spreadsheets and hadn't realised how much work there would be using spreadsheets time on the computer.

**What did you feel while this situation took place?**

Nervous and anxious at possibly doing the wrong thing as had made a few errors therefore was anxious of doing something wrong again.

**What do you think other people felt during this situation?**

Everyone in her department was helpful but they were all busy and she didn't feel she could ask.

**What did you feel after the situation?**

Still anxious with a number of duties and getting to grips with the day-to-day duties. Still often felt overwhelmed with workload.

**What do you think about the situation now?**

Feeling better but still feel under pressure as longstanding members of team have left and feel more work has come her way without fully feeling confident with existing tasks.

**What do you think other people feel about the situation now?**

Not sure.

### **Step 3 – Evaluation**

**Questions I asked were:-**

**(Based on 5 Why's) Why do you think you feel this way?**

Due to feeling anxious

**Why?**

Due to lack of confidence

### **Why**

Questioning ability

### **Why**

Making silly mistakes and afraid to make similar or same mistakes again

### **Why**

Too afraid to ask for more support.

### **What was positive about this situation?**

Feeling able to talk to someone and to ask for advice.

## **Step 4 – Conclusions**

The employee clearly explained she knew what she should have done in this situation which was talk to her supervisor.

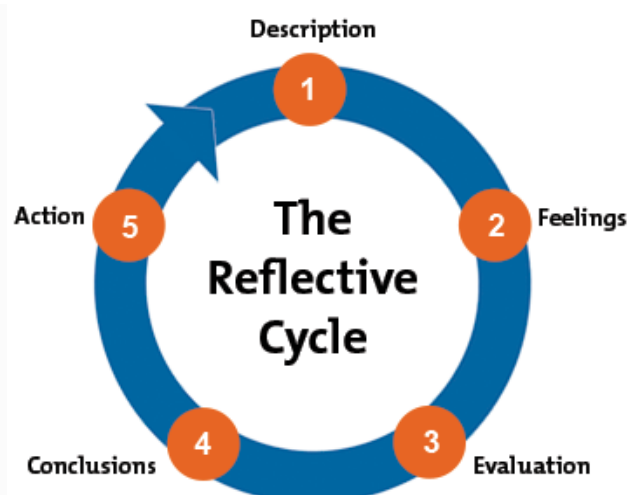
## **Step 5 – Action**

To continually discuss own performance with her line-manager being open and honest regarding feelings and workload pressures. I explained this could form part of her Achieve Framework which is way to seek continuous feedback, outcomes relating to performance such as individual targets. The employee was unaware of the Achieve Framework.

Ask for training on excel.

Ask for support when needed.

Ask for more regular Achieve meetings.



## **Gibb's Reflective Cycle – reflection model on own performance**

### **Step 1 – Description**

A corridor coaching moment that took no more 15 minutes. I have used the Gibb's model to reflect on own performance.

A relatively new employee often looked uncomfortable, anxious and about to cry. I observed this over a short period and continually asked the employee if she was ok. Every time she stated she was ok but busy.

The employee mentioned she was anxious on more than one occasion. When prompted she explained it related taking rent payments which meant she had to be on the telephone throughout the day. The employee does not like communicating in this way and finds it easier talking to people face-to-face.

One day I saw the employee in the corridor and she looked as if she was about to cry I pulled the employee into a meeting room to ask how she was feeling where she broke down.

### **Step 2 – Feelings**

**Consider what you were thinking and how you felt before the experience.**

I wanted to help the employee as she looked visibly distressed. I thought that she may not fit with the finance team as there have been problems historically. I thought that she may not be able to cope and was not receiving the support she needed from her supervisor.

**How did you feel during the experience?**

I felt sorry for the employee and could not believe the employee didn't know whether she was doing well or not. I didn't understand how the employee could not have known the level of computer work and spreadsheet basic knowledge for the post as a Role Profile is attached with the advert for the job. Questions were in the interview and the employee attended a second interview.

**How did you feel after the experience?**

Concerned that the employee would not ask for frequent performance meetings and be open and honest with her supervisor.

Apprehensive to the final outcome for the employee.

### **Step 3 – Evaluation**

I empathically listened to the employee acknowledging the employee's viewpoint and let the employee know that I cared about her situation. I ensured I gave the employee my undivided attention and listened to why she was feeling like this.

To clarify some of the key points the employee mentioned I paraphrased the conversation so that the employee understood I was listening, ensured I stayed neutral and non-

judgemental throughout.

I wanted to build trust in the relationship therefore I did not question the employee as to why she hadn't realised that this position would be using computers and basic spreadsheets.

I encouraged the employee to talk to her line-manager voicing her concerns, I explained that she needed to ask for a 1:1 which is usually conducted through the Achieve Framework to gauge her own performance. I explained the Framework is relatively new therefore the supervisor may not be aware this tool should be used. I was disappointed with the line-manager for not providing the correct level support.

## **Step 4 – Conclusions**

The employee clearly explained she knew what she should have done in this situation which was talk to her supervisor but was reluctant to do so. I left this with the employee to deal with without intervening. I believe that HR involvement could have a negative effect for the employee at this stage. If the supervisor knew HR was involved they may not give the right chances to the employee to improve before putting the employee on a performance improvement plan.

Instead, I mentioned in passing the use of the Achieve Framework to the supervisor hopefully to provide insight citing the different ways in which it could be used i.e. for new employees as a training tool, to list objectives and expectations of the role and finally as a performance management tool.

## **Step 5 – Action**

### **Future assurances:**

To ensure all supervisors are informed that they should use the Achieve Framework and the reasons why i.e. training needs, to go through Role Profile addressing the individual, department's and organisational objectives, performance management from setting SMART objectives to recording when an employee has completed a task well or may need intervention.

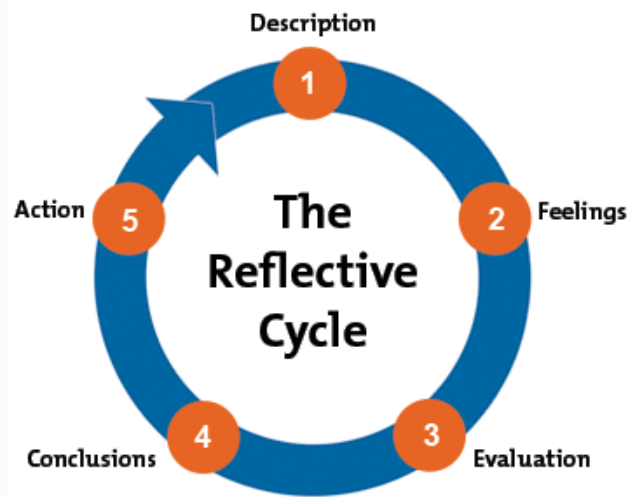
To check-in with the employee and encourage a mentoring or buddy for the future.

### **Skills to improve:**

To practice empathic listening – not to use my own story to try and validate how the employee is feeling.

To remain silent I don't have to fill long-silences.

To not provide the solution it is important for the employee to seek this themselves.



## MENTEE CONVERSATION TIP SHEET

Do you ever wonder what to say when you sit down to write your mentor? Do you sometimes draw a blank? Lots of people develop writer's block when faced with the task of writing. Not knowing what to say may result in short, unfulfilling e-mails between you and your mentor.

Your mentor has a wide range of life experiences; try tapping into these experiences by asking follow-up questions. Also, ask your mentor specific questions about his or her career and career choices. This practice may give your mentor some insight into the decisions you may be facing.

Here is a list of five thought-provoking questions you may want to use the next time you sit down in front of the computer to e-mail your mentor. Take some time to answer these questions yourself before sending them to your mentor. This way you can start a dialogue over e-mail about each question.

1. What is your greatest talent? What are some things you do really well?
2. How would your best friend describe your best characteristics and qualities?
3. What is the most important lesson you have learned in your life?
4. What is the biggest mistake you have ever made and what did you learn from it?
5. Who are some of the people you admire and why?

You may also want to share some of these more general questions with your e-mentor to get your online discussions going.

1. What did you do after you graduated from high school? Would you do that again?
2. What do you like most about your work?
3. What kinds of things do you do in your free time?
4. In what ways did your education prepare you for your job?
5. If you could go back to high school, what would you do differently?
6. Why were you interested in becoming an e-mentor?
7. How did you choose your career?
8. How do you define success? What do you think is most important for success?
9. Did you ever have a mentor? Do you have one now? How did that person help you?
10. What are your favorite, book, movie television show, and food?

Remember, your mentor wants to be involved in meaningful discussions with you online. This can happen only when there is a weekly exchange of meaningful e-mails.

## Mentoring Training Evaluation

|         |           |
|---------|-----------|
| Mentor: | Date:     |
| Mentee: | Location: |

**How would you rate the following:**

**1 = Needs Improvement  
5 = Excellent**

|                                                         |   |   |   |   |   |
|---------------------------------------------------------|---|---|---|---|---|
| Your overall impression of being mentored               | 1 | 2 | 3 | 4 | 5 |
| Was it effective, did it meet your needs and objectives | 1 | 2 | 3 | 4 | 5 |

**How would you rate the mentor in respect of:**

**1 = Needs Improvement  
5 = Excellent**

|                                       |   |   |   |   |   |
|---------------------------------------|---|---|---|---|---|
| Their knowledge of the subject matter | 1 | 2 | 3 | 4 | 5 |
| Their style & delivery                | 1 | 2 | 3 | 4 | 5 |
| Their ability to relate to your needs | 1 | 2 | 3 | 4 | 5 |

|                                               |          |            |          |
|-----------------------------------------------|----------|------------|----------|
| Overall the pace of mentoring was:            | Too Slow | Just Right | Too Fast |
| Would you recommend mentoring to someone else | YES      | NO         |          |

The most useful sessions were ...

The least useful sessions were....

I feel confident using....

As a result of this development I will.....

I'd also like to say (please add any additional comments here)....

# Mentoring Training Evaluation

|                             |                               |
|-----------------------------|-------------------------------|
| Mentor: <b>Kate Houston</b> | Date: <b>20th May 2019</b>    |
| Mentee: <b>Dylan McLeod</b> | Location: <b>Meyler House</b> |

## How would you rate the following:

**1 = Needs Improvement**  
**5 = Excellent**

|                                                         |   |   |   |   |          |
|---------------------------------------------------------|---|---|---|---|----------|
| Your overall impression of being mentored               | 1 | 2 | 3 | 4 | <b>5</b> |
| Was it effective, did it meet your needs and objectives | 1 | 2 | 3 | 4 | <b>5</b> |

## How would you rate the mentor in respect of:

**1 = Needs Improvement**  
**5 = Excellent**

|                                       |   |   |   |          |   |
|---------------------------------------|---|---|---|----------|---|
| Their knowledge of the subject matter | 1 | 2 | 3 | <b>4</b> | 5 |
| Their style & delivery                | 1 | 2 | 3 | <b>4</b> | 5 |
| Their ability to relate to your needs | 1 | 2 | 3 | <b>4</b> | 5 |

|                                               |            |                   |          |
|-----------------------------------------------|------------|-------------------|----------|
| Overall the pace of mentoring was:            | Too Slow   | <b>Just Right</b> | Too Fast |
| Would you recommend mentoring to someone else | <b>YES</b> | <b>NO</b>         |          |

The most useful sessions were ...

Yes, I was new to Ateb and I lacked confidence. I am not based at Meyler House instead out in the community so the session helping me access training and support from my supervisor were really beneficial.

The least useful sessions were....

Not sure I had any - the first sessions were getting to know one another from there we identified areas of my job I did not feel confident with. I think the first session was really important but didn't help me per-se.

I feel confident using....

As a result of this development I will.....

I will ask to mentor a work colleague.

I'd also like to say (please add any additional comments here)....

Kate was really helpful and always went out of her way to assist me. I feel if I have any issues I can go to Kate.

### **Summarised Evaluation Questionnaire Results**

Four employees wished to pursue mentoring with myself as their mentor. As good practice, I provide the mentee with an evaluation questionnaire to ensure the sessions were efficient and for reflective purposes on completion of the sessions. Due to our close relationship and the low numbers mentored, I am unsure as to its accuracy due to the personal nature of the mentee providing feedback on mentoring and my part within it. Providing accurate unbiased feedback is often difficult for individuals.

I mentored four employees, two were new recruits, the other two were existing employees, who either were promoted or changed their job roles due to restructure within their department.

Overall, results were pleasing with regard to rating the mentor; 4's and 5's were awarded; either good or excellent. Pace was just right for all respondents and all would recommend mentoring to another individual.

Respondents lacked confidence, skill or supervisory ability, regardless of the nature of concern, development for all was successful. New recruits responded that the 'getting to know initial stage of mentoring' seemed wasted time however, existing employees responded that getting to the root cause and being able to talk openly and frankly was a relief at such an early stage.

I used techniques such as powerful questioning to complete mentoring sessions and often set tasks for respondents to complete. Most found this useful and found the sessions engaging.

All mentoring sessions were brief however, I hope if further sessions are needed, they would seek a similar experienced colleague in the same field of experience as a mentor in the future or would ask me for assistance.

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