

Report to the Local Authority Pension Fund Forum
Business Meeting
21 January 2015



Agenda
Item: 12

LAPFF Mentoring Scheme

Summary

- In July, LAPFF member, Wiltshire County Council Pension Fund, requested that LAPFF consider providing mentors to LAPFF member local authority pension fund investment officers and managers on working in the Pension Industry.
- The recommendation that LAPFF source and provide such mentors for LAPFF member pension funds' investment officers and managers was considered and agreed by the September 2014 LAPFF executive meeting
- It was also agreed that in supporting the initiative there should be a structured approach to mentoring, and a governance structure put in place. This would involve a training process and asking mentors to come forward and LAPFF would oversee the mentoring and partnering arrangements.

Recommendations

- That members review and approve the proposed mentoring scheme.
- That the scheme is widened to include councillors or trustee equivalents if there is a demand for this.

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1. Introduction/Programme Outline

1.1. What is it?

This initiative is intended to link people new into the pension industry, or those who feel that they could benefit from regular contact with more experienced practitioners, with people who are experienced and who can offer professional support and guidance to others. LAPFF's role is to enable these links to be made and, as far as possible, to ensure that people are paired up appropriately.

1.2. Why is this scheme being introduced?

LAPFF was approached by a member to develop such a programme. It is considered it will be a benefit to its members, the pension industry profession and, indirectly, to LAPFF itself.

Some of the benefits include:

Benefits to Individuals

- Helps individuals find development opportunities to bridge experience and skill gaps
- Helps individuals build relationships with experienced, positive role models in the profession
- Provides support, guidance and assistance to professionals working in regional locations

Benefits to Mentors

- Opportunity to contribute to overall standards in the profession
- Opportunity to contribute to the aims of LAPFF
- Provides a challenging learning opportunity for the mentor

Benefits to LAPFF

- Practical, early response to senior industry forum data
- Supports LAPFF mission to support practitioners
- Networking and social aspects raise LAPFF profile in positive way

2. Who will be involved in the scheme?

2.1. People who nominate to be in the scheme will be paired according to work history and, as far as can be ascertained, personal and professional goals. In general, less experienced people will be paired with more experienced people.

It is envisaged that the scheme could also be open to councillors and that the pairings will ensure councillor is paired with councillor and office with officer. One LAPFF executive councillor member is already involved in mentoring another councillor and could be approached for input into the proposal

3. How will the scheme work?

3.1. Applications

People will fill in a short application form, detailing their work history, personal and professional attributes and the sort of person they would like to be paired with. Applicants will then be paired with a suitable partner based on this information.

3.2. Introductory Workshop

All mentors and mentees will be expected to attend a breakfast introductory workshop on a date to be agreed, where details of the scheme will be presented.

3.3. Follow up meetings

For the most part, mentors and mentees will work out between themselves how and when they will contact each other. There will be a get together mid-year for all participants and a final gathering to evaluate the scheme.

3.4. Contact between mentors and mentees

The frequency and mode of contact is entirely up to each pair but is recommended to be approximately every four to six weeks. It is suggested that a variety of strategies are used, including face-to-face meetings, phone and email.

4. What happens if the pairs are not suited?

4.1. This is a voluntary participation scheme and, as will be pointed out in the introductory workshop, there will be no compulsion to 'see it through' if, for any reason, you don't get along with your mentor or mentee. There will be a procedure in place to deal with this unlikely scenario.

5. Timetable and workplan implications

5.1. Expressions of interest in the scheme will be called for following the January 2015 Business meeting. A workshop will be held on date for mentors and mentees to explain the scheme. There will be an evaluation of the scheme at the end of the year.

5.2. Other elements of the scheme that is to be provided by PIRC will be the introductory session, co-ordination of pairing individuals in conjunction with a chosen advisor, availability for advice to new mentors/mentees, and the final evaluation.

Appendix 1

Establishing a Mentoring Programme

“(Mentoring is) A deliberate pairing of a more skilled or experienced person with a lesser skilled or experienced one, with the agreed-upon goal of having the less experienced person grow and develop specific competencies.”¹

“A mutually beneficial learning partnership in which a more experienced practitioner (a mentor) takes an active and nurturing role in assisting a less experienced practitioner (a mentee) to attain specific learning or professional development goals.”²

Components of a Mentoring Programme

The three main components required are (i) the mentor, (ii) the mentee, and (iii) their relationship. The purpose of the programme is to encourage the professional development of the mentee through the guidance and experience of the mentor.

The Mentor

An individual whose experience makes them an asset to those less experienced. The mentor will typically have a depth and breadth of knowledge and access to a wide network of contacts in the workplace, profession or industry that will allow them to assist in the professional (or personal) development of the mentee.

The Mentee

An individual who is less experienced but who wishes to develop professionally (or personally). The relationship with a mentor allows them to expand their knowledge of their workplace, profession or industry, develop their contact networks and make informed career choices.

The Relationship

Most mentoring relationships are informal and occur without the conscious knowledge of the participants – there is a long history of this happening. In a more formal programme, individuals can volunteer to be involved as a mentor or mentee – formal programmes are a more recent development. Generally speaking mentors should not have line management or evaluation responsibilities for the mentee.

¹ Murray M & Owen M, 1991, *Beyond the Myths and Magic of Mentoring: How to Facilitate an Effective Mentoring Program*, Jossey-Bass Inc., San Francisco.

² Adapted from: Martin G, unknown, *Creating Effective Mentoring Partnerships – A Professional Development Program for Teachers*, Centre for Excellence in Teaching, Fremantle, Western Australia.

Benefits of Mentoring for a Mentee³

The benefits can vary widely depending on the experience of the mentee but are generally agreed to include the following:

- Access to a role model
- Improved knowledge of the organisation, and /or industry Increased self-esteem, confidence and sense of self-worth
- Extended professional and personal networks
- The confidence to change and implement change
- Improved people management skills
- Improved listening and communication skills
- The confidence to set and achieve performance goals
- Having someone to talk openly to
- Being more ordered and reflective rather than rushing into things
- Having a wider perspective on the impact of their actions
- Being less ruled by feelings and more able to cope with difficult situations
- Opening up additional ways of thinking

Benefits of Mentoring for the Mentor⁴

Mentors can report the following benefits:

- Increased personal and professional satisfaction
- Improvement of management and interpersonal skills
- Development of new contacts and networks through the mentees
- Recognition as a 'wiser' or 'experienced' individual
- Opportunity to contribute to the overall standards in the profession
- Opportunity to contribute to the aims of LAPFF

Benefits of Mentoring for LAPFF

A mentoring programme can result in:

- Development of a 'learning organisation' culture
- Increased organisational awareness
- Support of LAPFF's mission to support practitioners
- Raised LAPFF profile through networking and social events

³ Mosquera-Pardo A, 2001, Mentoring Program Co-ordinators Workbook, Outside the Square Solutions, Perth, Western Australia.

⁴ Ibid

Appendix 2: The Mentoring Relationship

Mentor/Mentee Roles and Responsibilities

Mentor Responsibilities:

- Meet regularly with the mentee – face-to-face, phone, email
- Maintain strict confidentiality
- Listen and give feedback/guidance
- Monitor, review, critique, and discuss potential actions; do not just expect performance or give answers
- Reinforce relationship between employee and supervisor
- Introduce mentee to professional networks
- Provide coaching and advice on communication and managing professional relationships
- Explore career development opportunities and challenges

Mentee Responsibilities:

- Meet regularly with mentor – face-to-face, phone, email
- Maintain strict confidentiality
- Ask for and give feedback
- Take responsibility for own growth and success
- Obtain permission from supervisor if leaving work location during work hours to participate in Mentoring Program activities
- Maintain an emphasis on enquiry/learning

Suggested Discussion Topics

It has been shown that conversations early in the relationship have a significant bearing on what is achieved. Here are some suggestions for topics for early conversations between mentors and mentees.

- The 'Career Landscape' what kinds of opportunities exist; what are employers looking for? How those opportunities are best identified?
- Key strengths and development areas for the mentee. Experience profile/skills of both parties.
- Finding common ground in professional interests; work projects, reading/research, etc.
- Exploring views on contemporary topics, e.g. engagement practices, workforce diversity, ageing population, legislative changes and leadership practices.

These conversations can help to identify key topics of interest for both mentor and mentee, seeding conversations about what might be achieved in the relationship.

Professional Development

Many mentees have professional development and career advancement as primary objectives of such relationships. Here are some suggested areas of focus/enquiry to get the conversations going:

For Mentors	For Mentees
What are the mentee's career goals? -Do they seem realistic? -What further knowledge/experience would they need to achieve these goals? -Does their current job role support realization of these goals?	What are your career goals? -Do they seem realistic to you? -What further knowledge/experience would you need to achieve these goals? -Does your current job role support realization of these goals?
How does the mentee perceive themselves? Does that perception match other information/observations?	What is your current perception of your performance as an HR professional? Is this supported by feedback from others?
Does the mentee have a career plan?	Do you have a career plan?
How could you support this plan?	How are you implementing this plan?
Is it consistent with career goals?	Is it consistent with career goals?

Planning and Conducting Meetings

Before the Meeting

- Consider time, place and mood. These elements have a significant impact on meetings and their effectiveness.
- Think about the needs of your mentor/mentee. What will you have to consider to meet those needs?
- Be clear about your objectives. Plan and discuss meetings, including topics and proposed conversations in advance.

During the Meeting

- Agree objectives and outcomes
- Take time to build relationships
- Consider formulating an agreement. For some, agreeing the following up front can make for more effective meetings:
 - Level of commitment
 - Schedules/timing constraints
 - Level of confidentiality
 - Planning activities
 - Reviewing the progress of the relationship; how to move on if it isn't working

After the Meeting

- Communicate: little and often works well for many. Many mentoring relationships flounder because of 'losing touch' or 'time getting away'. Work at it!
- Debrief meetings over the phone a day or two after to allow time for reflection

Where to Get Help

The mentor/mentee network is a valuable source of advice from people in the same process. Remember to network at, and in between, LAPFF events. Use LAPFF. We are here to help. Initial contact can be made through TessaY@pirc.co.uk.

Appendix 3: Forms

The checklist below provides a description of the qualities that are most often thought to be conducive to successful mentoring. To use the checklist, read each statement and place a tick in the appropriate column which represents the degree to which the statement characterises the way you see yourself. There is no single 'ideal profile', but respondents who possess many of these qualities are likely to serve well as mentors.

Question		Strongly Agree	Agree	Neutral	Disagree	Strongly disagree	Not applicable
1.	I see myself as being people-oriented; I like and enjoy working with other professionals						
2.	I am a good listener and respect my colleagues						
3.	I am sensitive to the needs and feelings of others						
4.	I recognise when others need support or independence						
5.	I want to contribute to the professional development of others and to share what I have learned						
6.	I am willing to find reward in service to someone who needs my assistance						
7.	I am able to support and help without smothering, parenting or taking charge						
8.	I see myself generally as flexible and willing to adjust my personal schedule to meet the needs of someone else						
9.	I usually am patient and tolerant when dealing with someone						
10.	I am confident and secure in my knowledge of the field and make an effort to remain up-to-date						
11.	I enjoy my job						
12.	I set high standards for myself						

	Question	Strongly Agree	Agree	Neutral	Disagree	Strongly disagree	Not applicable
13.	I am willing to release my own power or control when necessary						
14.	I am reliable and dependable						
15.	Overall, I see myself as a competent professional						
16.	I am able to offer assistance in areas that give others problems						
17.	I am able to explain things at various levels of complexity and detail						
18.	Others are interested in my professional ideas						

Mentor Application Form	
Name	
Address	
Contact Details	Phone Email
Organisation	
Job Title	
Experience (in years)	
<p>Relevant Biographical Information (E.g. work and education history, professional organisations and hobbies. You may attach a copy of your CV or resumé if you feel that already describes you well.)</p>	
<p>What characteristics and attributes would you like to see in a person assigned as your mentee? (In answering this you are thinking of the characteristics of a person that you feel you would be able to assist given your background, experience and manner)</p>	
<p>What special skills, knowledge, characteristics, and/or attributes do you wish to highlight about yourself to help in the selection of an appropriate mentee? (Providing this information will assist in making a beneficial match between yourself and a mentee. E.g. you may be a 'big picture' person, your strengths may be in interpersonal skills, etc)</p>	
<p>I am willing to mentor more than one person (please circle): Yes No If yes, how many? _____</p> <p>_____</p>	
Signature of applicant	Date

Send completed application to:

Name

Email

