

FOLLOW-UP PROCESS WITH MENTEE ON COMPLETION OF MENTORING PROJECT - FROM FEEDBACK TO 6-month FOLLOWUP.

1) Process for six month follow up:

Ideally, the mentor will have a copy of the six-month follow-up form (or, “electronic postcard” as it is sometimes known for historical reasons) [see [Six-month follow up electronic](#) on website]. If mentor doesn’t own copy, again, ideally, the mentor should be sent this after their penultimate meeting with the mentee so that they can complete it with the mentee at the final meeting. If this doesn’t happen, you need to get the mentor to send the form to the mentee after the final meeting and encourage the mentee to complete it and to send it back to coordinator.

On receipt of the completed 6-month follow up form from the mentee, the coordinator needs to do 3 things:

- Save the form that the mentee has returned in the correct project folder. [[Charity Mentors/Projects/List of Projects/charity name/](#)]
- Make a diary note to follow-up in 6-months. When six-months has elapsed, the coordinator gets back in touch with the mentor, forwards them the six-month form, and asks them to contact their mentee and discuss progress. The mentor should send the coordinator a summary of that conversation once it has taken place plus any follow up actions for the coordinator.
- Copy the 6-month objectives/goals into the summary spreadsheet. The most up-to-date version can be found at [Charity Mentors/Projects/Checking Back/Postcards/Postcard Summary.xls](#)]. Also make a note on the spreadsheet of the followup date and the mentor/mentee details.]

After 6-months, send the mentor an email with the completed 6-month follow up form so that they can forward to mentee and ask for a meeting - either by phone or in person. After the meeting, the mentor should email the coordinator with a summary of outcomes plus any follow up action for the coordinator. The coordinator should copy the summary into the summary spreadsheet [Charity Mentors/Projects/Checking Back/Postcards/Postcard Summary.xls](#) .

2) Process for getting mentor feedback:

Once the final mentoring meeting has been completed, mentor or mentee (usually mentor) should inform the coordinator. Coordinator then does the following:

- Send an email to mentor, and attach mentor feedback form for them to complete. [See [Mentor feedback form](#) on website]. Or, [Charity Mentors/Templates/Mentor Feedback Template](#)] Email as follows:

Charity Mentors/Templates/Follow-up templates_complete process

Last updated: 2.6.20 by Roz

Dear (mentor's name)

Thanks very much for letting me know that your project with (mentee's name) is complete. (Add any personalized observations about how the project went if you know any...). I will send them a feedback form now and ask them to complete within 2-weeks. Could I ask you to do the same with your feedback form attached?

Best wishes etc...

- Send an [email to mentee](#), attaching the mentee feedback form. [See [<Mentee feedback form](#) on website. Or, [Charity Mentors/Templates/Mentee feedback form.docx](#)]. Make a diary note of the 2-week deadline, so that you can chase if necessary.

Dear (mentee's name)

[Mentor's name] got in touch to say that our project with you has come to a close. I do hope that you found [Mentor's name] support helpful. I know that he/she enjoyed working with you.

Would you mind completing our feedback form (attached). Our service is free and this is the one thing that we ask. We rely on the forms to help us improve what we do and to make sure that it is relevant. It would be very helpful if you could return it within the next 2-weeks (give specific date and make diary note). Let me know if holidays or other events will make that deadline difficult to meet?

I've also put (specific date in 6 months time) in the diary for (mentors name) to come back with follow-up on your 6-month objectives/goals.

Look forward to hearing back from you soon.

Best wishes etc

3) Process on receipt of mentee's feedback:

On receiving the mentee's feedback, hopefully without chasing, there are 7 actions:

- Check through the feedback to make sure that all the questions have been answered and that there is nothing that needs following-up (problems, queries, ambiguities, particular comments).
- Make sure the confidentiality status is clear. If it's not go back to mentee and double check.
- Make a note of recommended referral names.
- If you have already received the mentor's feedback, then forward the mentee's feedback to the mentor. If the mentor hasn't yet completed, it is better to wait. Ask

mentor if it is ok to circulate to wider group of mentors and try to pick-up and comment on particularly useful/complimentary statements in the feedback.

- Respond to the mentee. Email them, thanking them for feedback. Go through feedback form and copy and paste statements where we have been given permission to quote. Put together a testimonial and ask for permission to quote (see email below).
- If permission for testimonial is given, put testimonial (along with logo) on Charity Mentors website (<https://www.charitymentors.co.uk/testimonials/>).
- Circulate mentee (and mentor) feedback to mentor group.

Email to mentee asking for a testimonial:

Dear (mentees name)

Thank you very much for the quick turnaround on your feedback. I'm glad that you found the mentoring project helpful. We find the feedback very useful. Occasionally it is clear that there has been a real break-through because of a mentoring project such as a significant "strategic light bulb" moment or the resolution of a challenging situation, but the consistent theme seems to be the opportunity to share challenges, to make time to think strategically, and, very often, for affirmation of current decisions and direction.

Would you let us put a testimonial along with the xxxxx logo on our website? The best way for us to explain what we do is to let other people, in a similar position to you, read about the experience of others who have worked with a mentor [see <https://www.charitymentors.co.uk/testimonials/>]. I don't want to put words into your mouth – just save you time - so, if you are willing to do this, I selected some words from your feedback. Please don't feel obliged. Just let me know?

I would definitely recommend Charity Mentors. Working with a Charity Mentor will give you the opportunity to challenge your own ideas and find the best way forward as a result, and give you an external perspective from someone with expertise, and who really cares about your project.

I have put xxxxx 20xx in the diary as the date for (mentors name) to check-back.

Best wishes

4) Process on receipt of mentor's feedback:

Thank mentor for feedback and for taking on the mentoring project. Pick-up on any particular points in feedback and reflect in email. Ask mentor if they are free for a new project. Send mentor the mentee's feedback and circulate both mentor's and mentee's feedback to the wider mentor group.