

CHARITY MENTORS REFERRAL PROCESS TO ENSURE THAT TRUSTEES (AND SPECIFICALLY, CHAIR) ARE MADE AWARE OF OUR TERMS AND CONDITIONS AND LIMITED LIABILITY

- 1) Email response to people making an enquiry about mentoring with Charity Mentors Oxfordshire: *This is an example of an email which explains the process, including the necessity to SHARE with trustees the fact that they are thinking of working with a mentor.*

Dear xxxx

Thank you for your enquiry about working with a Charity Mentor. The next step is to have a conversation about how we might be able to help. We shall need about half an hour to do this. I have the following slots available.....

An outline of how we work is given below: *Connect, Share, Select, Focus, Review, Refer*. Just to draw your attention to the “SHARE” part of the process. Before we can go ahead with the mentoring project, we ask you to inform your chair that you are thinking of working with a charity mentor. Whilst the details of your mentoring project are confidential to you and your mentor, we do ask that you give your trustees an indication of why you would like to work with a mentor.

How our mentoring works – Connect, Share, Select, Focus, Review, Refer:

- **CONNECT** – Contact Charity Mentors and arrange a telephone conversation with the coordinator to establish whether your project is suitable and, if so, outline what your objectives might be.
- **SHARE** – If you are the CEO/manager of the organization, we ask that you share the fact that you are thinking of working with us with your trustees/board. If you are a trustee/chair, share with your fellow trustees. It makes sense in an organization with collective responsibility that everyone is aware of support at a strategic level. We ask your permission to contact your chair, or other trustees, to explain our role. We need email confirmation from them that they are on-board before we move forward.
- **SELECT** – We will then help you find the best mentor for your needs so that you can arrange a meeting. The aim of this first meeting is for you and the mentor to decide if you would like to work together on a project and to clarify your goals. You are not committed to working with Charity Mentors until after you have had this meeting.
- **FOCUS** – If you both feel that you can work together productively, you then have a period of around 4-months in which to complete the mentoring project. This might entail just a couple more meetings, or five or six. The whole project is designed around you, your organisation and your needs. The important thing is that you use your mentor whilst you have them!
- **REVIEW** – At the end of the project we ask you to complete a feedback form and we arrange to check-back with you after a period of around 6-months.

- **REFER** – The service is free-of-charge and completely confidential between yourself and Charity Mentors although we do ask if you would help us to spread the word and, at a minimum, you summarise the project outcomes to report back to trustees.

Kind regards etc

- 2) FOLLOW-ON FROM TELEPHONE CALL: Email to accompany referral form when sent to potential mentee: *This email gives notice that I am going to contact their chair.*

Dear xxxxx

Attached are some brief notes concerning our telephone conversation. As explained, I will use them to give a potential mentor an idea about the project, although you will need to revisit the details in your first meeting. If you think you can make things clearer, or I have inaccuracies, could you please amend?

It is important that you read the terms and conditions at the end of the form. By moving forward with the project, you are signaling that you accept them in full.

As part of our process, I also need to contact your chair to make sure that they are on board with our terms and conditions. You might like to give them some prior notice? Could you let me have their name and contact details as soon as you have done so? In the meantime, I will begin to think about who would be a good person to work with and check-out their availability but I cannot move forward until I have written acceptance from your chair.

Kind regards etc

- 3) Email to chair of mentee organization. *This email explains the limits of our liability to trustees and states that by replying to the email they are agreeing to our terms.*

Dear yyyyyyy

As you know, potential mentees name has contacted me to explore the idea of working with a charity mentor from Charity Mentors Oxfordshire.

Just by way of background, since our establishment in 2013, we have worked with over 150 Oxfordshire charity leaders. Our aim is to enhance the performance of leaders and, through this, to build the resilience of not-for-profit organizations. We know from feedback that we have had significant positive impact even with organizations that are professionally managed and strategically successful.

Our mentors have senior leadership experience (see <https://www.charitymentors.co.uk/our-mentors/>) and this has given both confidence to charity leaders and access to fresh perspectives from a critical friend. Our mentors are scrupulous in not giving advice. That is not their role. They

combine their skills of empathy, impartiality and questioning to encourage mentees to optimize their own problem solving abilities and strategic thinking. We act as a catalyst for constructive change and our involvement is short-term (usually around 4 – 5 months).

We do hope that you will be supportive of the idea of us working with potential mentees name. However, before working with him/her, we ask that you reply to this email to confirm that this is the case and you accept that responsibility for decisions made remains, at all times, with the trustees. Neither an individual mentor nor Charity Mentors can take any responsibility for decisions made, whether on the basis of advice given or not. We do ask that our mentees share the outcomes of their mentoring with the trustees and we would hope that this would, in any case, be a natural outcome in a functioning organization with collective responsibility for decision making.

We are looking forward to working with potential mentees name, and ask that you acknowledge agreement and acceptance of our limited liability by replying to this email.

Kind regards etc

When they reply, ask for permission to put on mailing list and cc Nichola

- 4) Email to check out availability of potential mentor.

Dear zzzzzzz

I have just spoken to so and so of such and such organization. He/she is looking to work with a mentor to I have attached the referral form which gives a bit more detail but if you want to talk about please feel free to call me on 07769 xxxxxxx.

Once I have heard back from their chair, and if so and so decides to go ahead with the project, would you be willing to meet with them to find out more? There might be a short delay whilst this all happens!

Kind regards etc

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- 5) AFTER HEARING BACK FROM CHAIR: Email to mentee to say that we have heard back from chair and to give them details of potential mentor.

Dear xxxxx

I am happy to say that I have now heard back from your chair and we can go about setting up your first meeting.

I have been thinking about who would be a good person to work with and wanted to give you some details about yyyyyy. (Copy mentor bio from website).

Kind regards

- 6) AFTER HEARING BACK FROM MENTEE TO SEE WHAT THEY THINK OF MENTOR: Email introducing mentee to mentor.

Dear xxxxx

I would like to introduce you electronically to *<name of mentor >* who has agreed to meet with you to discuss the mentoring project further. You should only go ahead after the first meeting if you both agree that you are well matched and that the mentoring relationship will be productive.

I have copied *<name>* into this email. Your next step would be to get in touch by email so that you can arrange a meeting.

The only other thing we ask is that, if you find the mentoring useful, you help us to publicize Charity Mentors: by word of mouth, by recommending other charity contacts who might find the mentoring helpful and, if possible, by a link on your website.

We also offer the following guidance to help your project run smoothly:

- 1. The first meeting is an assessment meeting at which both parties have the opportunity to decide whether to proceed with the mentoring project, or not. Projects do not proceed beyond this meeting except by mutual agreement.*
- 2. If you decide to proceed beyond the first meeting, agreement needs to be reached as to the location, duration and date of the next mentoring session. Discussion as to preparation for meetings is also helpful.*
- 3. There is an obligation on both sides to honor pre-arranged meeting times and to be adequately prepared for these meetings. If exceptional circumstances necessitate the cancellation of a pre-arranged meeting, adequate notice must be given. This also applies to responding to emails in a timely fashion and completing the final feedback form. In case of difficulties, please contact the Charity Mentors' coordinator.*

It would be helpful if you could copy me into emails regarding the setting-up of your first meeting and let me know whether you wish to proceed after that first meeting. If all is well, I will then leave the rest to you and your mentor. If the match doesn't seem right, we can talk again.

Kind regards,
