

# ***Staying afloat: an evaluation of the Health, Work and Wellbeing Management Support Project***

**Final evaluation report  
June 2011**

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Funded by

In partnership with

**DWP** Department for  
Work and Pensions



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**Further information & referrals to the ongoing** Management & Leadership Coaching/Mentoring service can be got from

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The Craighead Institute works alongside organisations combining training and consultancy that enable our clients to be all that they can be. We work internationally with a diverse range of organisations, particularly where values and faith are an important resource for mobilising the work.

*Our purpose is to meet organisations and individuals in times of uncertainty and doubt and accompany them towards hope and possibility. We do this by creating spaces where meaning and purpose can be revealed, and new directions taken, which bring about a better world.*



## 1. Introduction and background

The *Management Support Project* provided one-to-one coaching and mentoring support for twenty-one small and medium enterprises (SME's) in the voluntary and faith sector across Scotland. This was funded under the Department of Work and Pensions Challenge Fund for Health, Work and Wellbeing.

This was delivered by a partnership of the Craighead Institute<sup>1</sup>, the Church of Scotland Parish Development Fund and the Community Health Exchange (CHEX). Craighead provided dedicated project management and three associates to act as mentors. Both the Parish Development Fund and CHEX advertised the availability of mentoring support through their networks of projects. CHEX also provided two members of staff as mentors. *Research for Real* provided on-going evaluation support to the programme throughout and is responsible for this final report.

The mentoring team were Jo Kennedy, Joette Thomas and Duncan Wallace, (Craighead Institute Associates) and Janet Muir and Elspeth Gracey (CHEX). The team was supervised by Duncan Wallace.

## 2. Project description and details of delivery

The project provided regular in-depth mentoring sessions with the chief officers of each of the organisations. The purpose of the mentoring was to support managers to offer a higher quality service at less personal cost to themselves; the mentoring was intended to strengthen both the individual managers and have an organisational ripple-effect. The underlying 'theory of change' is developed further in section 3.

The project commenced in April 2010 and provided regular mentoring sessions for each individual manager, usually spread over a period of about nine months. The project also provided two action learning sessions to bring the participating managers together to address their sense of isolation. The sets were expected to enable them to experience a peer-learning approach, practice problem-solving skills and counter any potential dependency on mentors. These were held in Edinburgh and Glasgow in January and March 2011.

The project supported a range of types of organisations including eight church-based social projects and thirteen community health based projects. All of the organisations worked with marginalised communities. The client groups they focused on were also very diverse including work with young people, on homelessness, housing issues and mental health, work to build geographical communities and to support families in need. Their sizes ranged from two to 23 members of staff.

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<sup>1</sup> The Craighead Institute is a registered charity founded in 198. It enables individuals, communities and organisations to use their values, faith and passion in the pursuit of social justice. [www.craighead.org.uk](http://www.craighead.org.uk)



The context for all of the organisations that were targeted was one of increasing competition for funding and increasing demand for their services. Furthermore, in choosing to target people of faith and those working with a strong values-based vision, the project was rooted in the partners understandings of the particular challenges facing such organisations; their previous experience suggested that there were likely to be complex personal and professional motivations, beyond those often found in the small scale voluntary and community organisations. Strong faith and identification with a cause or particular community can bring significant additional risk factors of either 'burn out' or counter-dependency.

All of those that were recruited to the programme were experiencing significant change. They were diverse in terms of their previous experience; some had been running projects for many years, including some that had founded the organisations they now work for, although a few were new to their post. Some had postgraduate management qualifications. Many were facing the specific challenges of managing decline and loss of staff, although a small number were in the process of expansion of their reach and activities, including developing social enterprises. Some managers were specifically seeking support to secure their succession and the longer-term sustainability of the organisation, so that they could leave in a non-disruptive way.

The project was over-subscribed within a few weeks. The use of the PDF and CHEX networks proved to be a useful way to reach a sufficient number of eligible managers. No further marketing was undertaken. To meet the demand, the Craighead Institute secured additional funding for three places from the Robina Goodlad Trust.

A total of 127 mentoring sessions were delivered in Glasgow, Perth, Edinburgh, Inverclyde and North Lanarkshire. Most of the managers used all their mentoring sessions available throughout the 9 months available.

The total delivery cost was approximately £1200 per organisation. Mentees met their own travel and subsistence costs. Meetings usually took place in public venues so there were no additional costs.

Several managers were prepared to travel some distance to meetings with their mentors and mentors themselves were flexible in their approach with some sessions delivered over the telephone to enable the participation of mentees in remote rural areas.



### 3. Evidence of the impact of mentoring

#### Approach to evaluation

The approach to the evaluation of the programme was based on a number of sources of evidence:

- developing a monitoring and evaluation framework through a logic model to articulate the theory unpinning the programme and expected short and long term outcomes;
- the development of a set of outcome indicators
- a pre and post-evaluation questionnaire
- feedback from action learning sets
- narrative data provided by mentees
- commentary and observations by mentors

This material has been used together to develop a set of case studies which are included here. Section 4 discusses the data in more detail and identifies conclusions.

#### Developing a monitoring and evaluation framework

The monitoring and evaluation framework for the programme was developed through the articulation of a logic model or theory of change by the mentors. This was done through a prospective story-based process that encouraged mentors to highlight and discuss the kind of changes they would be expecting to see within both mentees and their organisations and to support them to begin to embed more 'evaluative thinking' into the way that they manage the mentoring relationship.

The overall model is included in Annex 1. It builds on the initial identification of goals for the mentoring relationship to a set of clustered outcomes that it would be reasonable to be able to demonstrate by the end of the mentoring relationship. These were:

- Improved time management
- Greater adaptability and flexibility in leadership
- Greater skills & confidence
- Improvements in working relationships with others
- Management of self in role

Beyond this, it was expected that would also be further or wider effects, although these would not necessarily be directly measurable.

- Reduction in stress related absence from work for staff and managers
- Reduced management stress and burn out
- Adoption of more effective management, coaching and mentoring practice within organisations



- Better working relationships with Boards
- More effective development & implementation of business and strategic plans
- More effective partnership working with funders and other organisations

Following this, a set of 35 specific outcome indicators were developed, in five different categories, with an option for mentees to devise their own specific indicator if they wished. These were incorporated into the questionnaire tool and it was expected that mentees would select between 5-10 personal outcome indicators that matched their specific goals for mentoring (see Annex 2). Mentees were asked to score themselves for their chosen indicators at the commencement and end of the mentoring process.

The questionnaire also included a post-evaluation of four levels of learning that might be anticipated<sup>2</sup>:

1. I used the mentoring to solve very specific issues that I was dealing with
2. Mentoring helped me to rethink the issues I was dealing with and make links between different issues
3. Mentoring gave me some insight into how I learn and other aspects of my personal development.
4. I used the mentoring to look at wider issues of organisational culture and my own life and career issues.

The questionnaire also identified a number of key features of the mentoring relationship as follows:

- The value of the time of someone without an agenda
- The structure and discipline to find time for reflection
- Challenge to my thinking provided by the mentor
- Access to networking with similar others
- Flexibility of meeting times and arrangements
- The fact that it's free
- Strong shared values between myself and mentor
- Expectation of self-directed learning

The scoring of outcome indicators at the pre and post-stages of the process had been intended to support the initial discussion about expected outcomes from the process between the mentor and mentee. In practice, this proved to be problematic; mentors themselves adopted different practices in relation to how they handled this aspect of the process, depending on how comfortable they felt. Those with more experience were less inclined to adopt the use of the questionnaire and were content to let mentees decide how they wished to

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<sup>2</sup> These were based on a four-level model of action learning, developed by the facilitators of Action Learning based on research in the United States ("Action Learning: Theoretical Bases & Varieties of Practice" – L. Yorks, J. O'Neil & V. Marsick – in "Action Learning: Successful Strategies For Individual, Team & Organisation Development" – L. Yorks, J. O'Neil & V. Marsick (Eds.) – Baton Rouge, Academy of Human Resource Management, 1999).



respond. This meant that although all mentors had an initial conversation with their mentee about their expectations and goals, this was not always recorded and scored in a consistent way. The scoring is therefore of limited value for purposes of evaluation.

However, the commentary provided by mentees and other aspects of the questionnaire do allow reporting of clear evidence of the outcomes achieved. Mentees also provided their assessment of the four levels of learning and scored how they valued the key features of the programme. This data has been integrated into the compilation of the case studies below along with some additional narrative material provided by some mentees.

### **Feedback from action learning**

Eight people attended the initial set and six attended the second one; only one person attending both.

The sets identified common themes of managing staff, boards and the insecurities of the current climate, particularly in relation to finances and partnership working. Many reported a knock-on effect of the insecurities and frustrations of the public sector being felt within the voluntary sector. They discussed role dilemmas in relation to issues such as sharing information, affects on planning and the service they provide to people. In this context, they described the role of the manager or leader to be '*a jack of all trades*'. Their own wellbeing was rarely addressed.

The two action learning sessions were evaluated through feedback at the end of the session. This feedback suggested that participants valued being in a 'stranger set' where they did not know the other participants and this was a useful confidential space in which to explore their issues. The action learning process was valued as a way of disciplining their problem solving skills and some people reported having useful insights from the process. This gave some a better sense of perspective and recognition that they were not alone in facing their dilemmas. Some were keen to try out the approach with their own teams.

The mentor feedback suggested that the action learning process had not worked as well as they had hoped; they felt it was difficult to get a good energy going and were disappointed that more people did not attend. There were some administrative difficulties with bookings and this cannot have helped create the right atmosphere. Some mentees found it difficult to commit to a whole day of learning in contrast to the relative efficiency of a 1.5 hour session of mentoring support.

## Case studies

This section concludes with a series of thirteen anonymised case studies which together reflect the range of organisations mentors have worked with in terms of size, target group, geographical spread, faith-based or generic focus. Together they illustrate both the distinctiveness and the commonality of the mentee experience. Section 4 discusses the themes.

### Case study 1: Travelling on a Journey

Susan has been a youth worker at a small youth ministry project in the west of Scotland for three years. She is enthusiastic and describes herself as someone that loves her job and working alongside a committed team of volunteers and management committee members. At this time, the project was growing, and she was finding that sometimes the demands of this phase were overwhelming.

Her main initial goals for the mentoring process were about managing her workload, working more strategically and working with the management committee.

She used the mentoring process largely to rethink and link the issues she was dealing with and to develop insight into her own learning and other aspects of personal development. To a lesser degree, the mentoring helped to solve some specific issues she was dealing with and allowed a look at some wider issues of organisational culture and her own life and career issues. Consistent challenges revolved around the division in time that she gives to her job and as mentoring progressed she took a significant step back to develop positive strategies of achieving a more equal life-work balance.

She has valued all the aspects of the mentoring relationship, in particular the value of time with someone without an agenda and the structure and discipline of time for reflection.

Over the past year she says that the mentoring experience has been a *"journey of learning from taking the wrong directions"*. She has developed a stronger sense of self-worth by learning that it is important to take time for and look after herself. By protecting time, she has found that this has had a positive impact on herself, relationships and the work itself. Other benefits have flowed from this and clarity of communication of vision and goals has supported new developments for the project, including a number of positive steps that have strengthened her position within the organisation. She comments *"I'm now looking forward to the future in a brighter way. Overall, mentoring has been a positive journey and one that won't stop now but will continue into the future"*.

### Case study 2: The challenges of remoteness

Joe is the Project Manager at a youth agency in a remote rural community. He had been in post for about three years and has four staff in post. He faces the



particular challenges of running a small voluntary organisation with diminishing resources and supervising a small staff team where the local culture is challenging in terms of maintaining confidentiality and boundaries between professional and personal life.

On starting the mentoring programme his main source of support were family and friends and he felt isolated from his peers both locally and those from further afield. His main goals for the mentoring relationship were about being able to better manage staff, manage his own personal workload and work more strategically. For himself, he was hoping to gain in confidence, make better informed decisions, and *“be able to entice staff to perform better”*. His approach was to have an open door to his office, which meant that he was getting caught up in the urgent and immediate things that his staff wanted him to deal with, rather than his own priorities.

In practice, he used the mentoring largely to solve some very specific issues around supervision and particularly valued the chance to have someone to talk to without an agenda. Yet, isolation and distance were limiting factors: three mentoring sessions were done on the telephone, with other sessions held in the central belt, fitted around travel for other proposes. Time management remained an issue and the issue of future funding was starting to create insecurity within the organisation. He did make some limited headway but on balance, whilst the initial six sessions were positive, they were ultimately limited in their impact. He does acknowledge that he has developed clarity of thinking about issues and ways to address them and a clearer appreciation of the need for regular mentoring. This has had a practical outcome as he has now managed to arrange for further support and has also recently discovered an existing network of peers from the wider sector. He also began to improve his supervision sessions with staff, leading to them beginning to get a healthier model of their professional and personal boundaries.

### **Case study 3: Time to think**

Carolyn works as the part-time manager of a community based, user-led mental health service, with five part-time staff members. She is a very experienced manager, who is about to retire, but who needed somewhere of her own to manage her stress. The organisation was facing the imminent expiry of the existing Service Level Agreement and needed to work on their next business plan.

She was looking for protected time to reflect, explore the new challenges and develop greater flexibility in approaches appropriate to the changing environment and organisational needs. Personally she was aware of the need to stay optimistic in the current economic climate and also sustain funding in the face of funding cuts and increased competition.

She used the mentoring very specifically to help her solve particular issues she was dealing with and most valued the time of someone without an agenda.



She also valued someone with knowledge of the sector and used the mentor as a sounding board. Having this space to reflect was important and enabled her to take a 'balcony view'. She used the time to critique ideas before board meetings and so was better able to deal with her feelings of 'panic'. She acknowledged that mentoring wouldn't take away the uncertainty, but that it was valuable in scenario planning for different eventualities.

#### **Case study 4: Thinking out loud**

Peter is the Director of an advocacy service for people using mental health services, working with around 20 different members of staff and a number of volunteers. The organisation had doubled in size in recent months through success in winning competitive tenders.

Peter was relatively new to the role. There were major issues about adapting to change, and looking at new areas of business in the future, as well as clarifying respective roles for the Director and Board. He was looking to use the mentoring process to enable him to work more strategically, work better with the Board and develop his own confidence and skills in the role. He wanted impartial advice, information and support from an experienced professional working in a similar area to him. A major part of those challenges was facing the many unknowns arising from strategic reviews of the sector. These reflections from his diary provide insight into the value of the mentoring process:

*"Mentoring has been helpful as [my mentor] has reinforced the thought processes that I have had, forcing me to think out loud. ....I feel it has helped reduce anxiety in my new role. I need to ensure that this (external support) carries on".*

Peter used the sessions exactly as he had set out to do: he overcame the 'newness' in role anxieties and established valuable relationships and partnership working processes with other local organisations which have strengthened the strategic position of his organisation. During the course of the mentoring he dealt with issues regarding his relationship to his Board which were strengthened and he also dealt with difficult staffing issues with clarity of purpose and successful outcomes.

*"....the mentoring did not give me the answers. Sometimes unwittingly, I had the answers anyway but needed support to reassure myself of the correct course of action. In a similar way to an Action Learning Set, if [my mentor] had given me the solutions, I would not have developed myself through the process. So in that respect, the process is as important as the outcome".*



## Case study 5: Worth its weight in gold

Frances works for a faith-based family support project for young parents, originally started by the congregation. She is the Project Leader working with one part-time colleague and around 20 volunteers. She was looking for a confidential reflective relationship with the mentor in which ideas and experiences could be shared and practical choices developed.

She was finding it difficult to delegate task to others and didn't always have a clear understanding of roles, both her own and that of others. She wasn't good at recognising when she was overloaded and poor communication with a colleague was an issue. Initially wary, she was relieved by the prospect of external support from outwith the church; *"where do you go when you are part of a small organisation and the person making your working life terrible is the chair?"*

Initially she met with her mentor at a place between their respective locations; *"she helped me make sense of situations and behaviours by asking relevant questions, reflecting what I said which allowed me to take appropriate actions. The mentor was sympathetic but professional - her personality, skills and experience helped me to stand back from the situation and see what was happening. This made me aware of different approaches I could use".*

These conversations clearly helped her to make sense of the situation and develop strategies to use to address the issues. In the short term, things got worse and she went off sick with anxiety and stress. The mentoring continued over the telephone and further external support and representation led to a resolution of the situation.

She says *"my experience of mentoring has been excellent, it stopped me feeling isolated and supported me when I didn't know which way to turn. Working in a small voluntary organisation can feel lonely for managers and leaders and this type of support is worth its weight in gold. Without this service I could not have continued in my post".*

The mentoring had come at the right time for her; it brought some of the longstanding issues to a head and enabled them to be resolved. As a result, the Chair of the Trustees is now adding in external support and travel into the annual budget, in recognition of the need to resource this kind of support in future.



## Case study 6: Getting over 'I'm too busy'

Dougie is the project manager for an arts-based organisation. He had been in post for ten years and manages a team of eight staff, volunteers and sessional tutors. The organisation was on a sound footing in many respects with good staff and partnership working, but was limited in terms of development by a lack of physical space. Immediate issues were the desire to move premises and to move more firmly into the social enterprise area.

Dougie was looking for objective feedback on how he approaches his role. He was hoping for space to reflect, take advice and make plans for positive change and also to get a sense of the 'distance travelled' as a result of the process. Time management, overload and lack of energy were all issues. He says he did not feel particularly self-confident as a manager, was feeling very pessimistic about the future for the organisation and he felt that it did not have a strong sense of the next steps.

The mentoring showed that there was a substantial mismatch between his own view of his abilities, competence and knowledge and his real achievements. His mentor suggest that *'he was trying to do it all himself and was letting the Board off the hook for tasks that they could appropriately undertake'*. The mentoring used this mismatch to unpick some of the issues he was dealing with.

Dougie suggests that he made some positive progress in all the outcomes he was seeking and completed the mentoring programme with a sense that further positive change was possible with time and attention given to the next steps he'd identified and by continuing to reflect. He used the mentoring in a number of ways; to solve specific issues, to rethink and link issues, to gain insight into aspects of learning and personal development and broader issues of the organisational culture and his own life and career issues. He says:

*"The mentoring relationship has allowed me to devote time and attention to my own personal development and reflective practice. I would not have ordinarily chosen to spend this time due to personal attitude ('I'm too busy!') and lack of support from my board. As a result I now have some key objectives to move towards, more overall support and a more positive outlook towards my job".*

At the end of the mentoring the Board were taking more responsibility for the overall development of the organisation and, in fact, were pleased to be more involved. Dougie also was more confident in his own skills and that being confident and secure was not 'arrogant' or bigheaded. He attributes much of the success to the skills, approach and experience of the mentor; *"she has been non-judgemental, open to suggestion, insightful, interested in listening rather than advising, challenging when needed and serious at all times about my development."*



## Case study 7: Keeping my balance

Kim is a project manager of the community based youth work project, with a small staff team. She faces issues about the quality and structure of the governance, working with a new Board, investment in the premises, and securing future funding. The start of the mentoring she was working well beyond her weekly hours, and risking creating an environment of unrealistic expectations for herself, other staff and Board members. The mentoring came at a time of chaos and uncertainty for the organisation. She had begun to doubt her ability to fulfil her role and says that without the mentoring she would probably have resigned. Kim was initially unsure about the value of the mentoring and was concerned that it could simply add to her workload.

These fears were resolved at the first session. At the start, she did not have any support in her role and was hoping that mentoring would be an opportunity for confidential sharing, objective reflection and support in meeting the challenges. She explains why maintaining some work-life balance is so difficult;

*"I have always been involved in employment that is so worthwhile that my enthusiasm and commitment to it means that I do far more than is required by my contract."*

Kim found the chance to explore live issues and concerns to be therapeutic in itself and a help in retaining confidence and perspective in a prevailing atmosphere of antagonism and negativity;

*"exploring issue with someone who was fully objective and outside of the areas of concern was truly invaluable and is now something I would recommend as best practice".*

Her main use of the mentoring was to help in rethinking and linking issues and dealing with specific concerns; *"I was able to keep a sense of balance and self worth in the face of criticism and of optimism for the future".* Whilst this issue is not resolved, she says the mentoring has helped her to curb this tendency – *'at least most of the time'!* It also gave her confidence and a better ability to evaluate her own performance and that of her staff. When the mentoring sessions finished, Kim seemed optimistic and enthusiastic about the potential way forward. With new additional Board members, who had expertise in fundraising and who acknowledged the expertise and commitment of staff, she was positive about the future and hopeful that the organisation would soon be in a stronger position to secure further funding. She suggested that the mentoring support would have a lasting impact: *"I will strive to continue to implement the strategies we developed for coping and evaluating my work in future."*

## Case study 8: Moving forward together

Beth is the manager of a faith-based community organisation that works with children, young people and their parents and has around ten members of staff. She has been in post since the organisation was founded ten years ago. Recent years have seen successful funding bids which have supported an expansion in the numbers of staff and the geographical reach of their work. This brings further challenges of seeking new premises and working with the Board.

Beth has had mentoring support in the past. Her goals for the mentoring were about working more strategically, managing change and developing her own confidence and skills in the role. She was hoping to use the time to think through processes for change and solutions in an open, honest and confidential environment. She was very focused in her approach to mentoring and clear about what she wanted to achieve in each session.

She primarily used the mentoring to solve some specific issues she was dealing with, particularly valuing the time of someone without an agenda and the structure and discipline of the time for reflection. She implemented solutions that emerged in the sessions and followed a logical approach in her problem solving. However, her mentor suggests that she remained 'self-sacrificing' as she was slower to resolve issues that related only to her.

Her own assessment of progress showed improvement in key areas of delegation, more confidence to make creative and positive change, working with others and overall being more optimistic about future challenges and her ability to manage change effectively. There was wider change evident, with the Chair taking on more responsibility and greater staff involvement in strategic development helping them to be more appreciative of Beth's role.

## Case study 9: More time out

Catriona is the Operations Manager of a community centre which provides a wide range of services and support, funded by many different sources. She has been in post for many years and works with a staff team of about 20 people and 70 volunteers.

She was looking for space and time to discuss her role as a manager, to look at how she might improve her work and create a better work-life balance. Specifically she wanted to focus more on strategic issues, to cope better in the uncertain funding environment and motivate staff to become more engaged with organisational development.

The mentoring helped her to make some progress. She appreciated the time of someone without an agenda and the challenge to her thinking provided by the mentor. The 'time-out' was important and the flexibility of the support was valued in the sense that it was not expected that she would work to a predefined outcome but use the time to explore issues. She also appreciated the fact that the mentor understood the sector in which she worked and that



the support was funded; with further funding available she would have liked a longer relationship with the mentor. Catriona did make a concrete change in her practice; she set aside half a day every week out of the office to plan, reflect or develop something. This was quite a significant change in practice for her. She also worked with her mentor to look at how her staff team and board could work more effectively together so that she didn't act as a buffer between them. This drew on some management and leadership theory which seemed to work well in the limited time available.

### **Case study 10: No simple solutions**

Gordon is a Project Coordinator for a community-based health project which runs a variety of small-scale projects. He has been in post for three years. He has a background in community development, but doesn't have much management experience. As a manager, he feels isolated and lacks any external support.

The organisation has 24 staff and has grown rapidly in recent years to a turnover of about £0.5m. Challenges identified at the beginning included the need to make the organisation sustainable, possible restructuring and development of social enterprise.

Gordon clearly valued the mentoring and the time with someone without an agenda; he used the time to rethink and link issues he was dealing with and to solve some very specific issues. Nevertheless, very little changed in a positive direction; he describes the period as the most stressful and difficult of his working life and as a period of 'crisis management'. He says: *"it was a really good time given the challenges we have had to face. We have had to make four people redundant, which was not what I signed up for. The mentoring enabled me to work on how that is affecting us emotionally."*

The mentor was useful as a sounding board and way of getting critical feedback. In looking back, he acknowledged that he is still taking on too much given the lack of capacity within the senior management team. He concludes: *"cultural and organisational change takes time and is difficult – there are no simple solutions but the mentoring enabled exploration of different options in safe space"*. He is now requesting the resources to keep working with an external mentor.

### **Case study 11: Staying afloat**

Ruth is the manager of youth cafe working with a small team of four staff and two sessional workers. She works with a local Board who are growing in their confidence; she says the main challenge they face is about *"getting the culture right"*.

She sees the mentoring has having been a life-buoy. The main focus has been on how she learns and on other aspects of her personal development. She has valued the time of someone without an agenda, but who has strong similar values and also has provided challenge to her thinking.



*"Prior to joining the Management Support Project, I felt I was literally "drowning" in a sea of negativity, conflicting opinions and motives, urgent tasks and generally felt out of my depth. Basically, every time I headed off to work I felt I had left home with a life jacket and as soon as I walked through the front door to work, I became swamped and started drowning...."*

*Mentoring has literally been a life saver - a life buoy to help me at work. It didn't stop the "sea" being rough or deep but it made it a whole lot less scary and easier to stay afloat. I can thoroughly recommend it - it has made a huge difference to both my work and my volunteering. I now have a clearer picture of who I am and how I work, as well as the people I work with. I really can't praise this initiative enough - words cannot begin to describe how it has helped me".*

In terms of impact, mentoring has helped her to manage her time and prioritise, improve staff management and develop a better shared vision: *"I do now get feedback and encouragement. They are now looking at the place with the same eyes as me and so I have more sense of a direction"*. She is more satisfied with the amount of time that she works, is better at recognising overload and has strategies that work to help her deal with the stress. She is more adaptable, realistic and relaxed, so is less inclined to focus on what she's not doing well: *"it's given me confidence to tackle things rather than the downward spiral of stress. The mentoring insights have also given me the confidence to start a new charity with others"*.

### **Case study 12: Safe space**

Fiona was a relatively new Development Coordinator for a tenants association with five full time staff. The organisation faced a number of challenges, including the need to tender for the continuation of a service contract, bid for new opportunities and a need to demonstrate their impact. They were also looking to exploit the organisations' anniversary which gave opportunities to celebrate past achievements and create a higher profile for the organisation.

She had already had some early success in the new role such as building positive relationships with the Board members and dealing successfully with staffing issues and recruitment of new staff. She wanted to build on this and was seeking support from mentoring to work more strategically, develop her own confidence and skills and acquire greater knowledge about key issues. She valued the 'safe space' provided to discuss work issues.

By the end of the mentoring, she had developed a range of strategies that worked to help to manage stress. She was finding time and space for reflection, was more self-confident as a manager and less inclined to focus on what she wasn't doing well, and she felt that there was a greater sense of authority and respect for her in her role. She had a less clear sense of personal direction, but viewed this as a positive outcome: *"I'm more open to other opportunities I may not have thought possible"*.



For the organisation, she felt that they had developed a stronger sense of the next steps and are more focused in terms of governance and strategic goals. She was also seeking and getting more support from the Chair of the organisation.

Overall, it is clear that she used the mentoring principally to solve some very specific issues and rethink and link different issues. The main value of mentoring was the 'regular space' with someone without an agenda, who you could use to check out ideas with and explore possible directions: *"[my mentor] had real personal empathy. She understood me and I didn't have to worry about trust as I knew she was going to be confidential and that I could talk quickly. She was able to give practical examples and references that helped me in the decisions I was making, such as talking through whether Social Return on Investment would be useful for us."*

This exploration of ideas was invaluable: *"it is very complicated as the manager about how much you lead your Board and how much you present options. Quite often they need recommendations, so the space to check out ideas before hand was invaluable"*. She says that this space for reflection has led to clearer thinking and therefore less personal stress.

She is also able to identify positive organisational benefits and had taken a number of practical steps including undertaking capacity-building on procurement and tendering processes and creating opportunities for feedback with her Chair: *"I have a much better relationship with the Chair. I'm in the process of securing the business by co-developing the business plan together with negotiating for 4 years funding. This year we have re-vitalised the organisation and grown by 25% in membership"*.

Fiona had also attended an action learning set meeting; she found this to be useful in terms of the benefits of meeting others in similar positions, and gaining further insights, but also in learning about an approach which the organisation is now using in team meetings.

The only limitation is that there is no further funding to allow a further 6-12 months of mentoring.

### **Case study 13: Preserving my physical, mental and emotional health**

Jim was new to the role of project development worker in a ministry community development project. This was a fixed term contract and he has subsequently moved on; he has reflected on how the mentoring programme supported him to manage the challenges of legitimacy of his role in the absence of close allies and to take his learning into a new role.

He suggests that mentoring has enabled him to cope with an extremely challenging working environment; develop his own competence in his role; given him a deeper appreciation of organisational dynamics and provided a needed outlet that *"preserved his physical, mental and emotional health"*.



At the beginning, he identified a need to work more strategically, develop his own confidence and skills in the role and think through his own future and career development. The mentoring support helped him to stay focused and be less vulnerable:

*"Throughout the process I found my mentor's support to be exactly what I needed. As I was for a long period left without effective management. My mentor suggested many useful strategies to enable me to stay focussed. I was provided with useful tools to better understand the inter-personal dynamics at play and strategies to enable me to be assertive in my role in ways that would avoid or de-escalate conflict".*

He says that *"... at times I felt fairly vulnerable because I believed very much in the work I was involved in, but could've been asked to leave at any time – having a mentor available for regular meetings and at the end of the phone was, at times, a God-send. I have no doubt that I would have been left completely burned out and useless if not for the work put in to support me by mentor."*

He strongly valued the time of someone without an agenda and made a wide use of the mentoring relationship to solve very specific issues, rethink and link different issues, gain insight into personal learning and development and to look at wider issues of organisational culture and his own life and career issues.

He discussed the new job application with the mentor and once successful, they helped him with the transition to working for a different organisation in a similar yet different context. He says *"all the advice and support provided has, I believe, stood me in good stead in my new role. I've been able to start off in a very intentional manner and have built the various strategies for assertiveness, conflict resolution into my working practice. I am able to resist pressures more than I was, and I am less likely to get bogged down in day-to-day activities and think and act strategically instead."* There have also been positive spin-offs for his new colleagues:

*"In my new role I have been cast into a quasi-mentoring relationship with some new colleagues and I have found it possible to pass on quite a bit of what I learned from my mentor to the benefit of this new team."*

## 4. Analysis of the impact of mentoring

### Context

The case studies are striking in the way that they convey the strong values base of the managers, their commitment to their work and the support that they provide to many vulnerable individuals and communities. This values-base, whether rooted in faith or social-mindedness, is a source of strength but can also be an additional stress factor.

Whilst there are some organisations represented who are in a relatively strong position, a shared contextual feature is uncertainty, whether of funding, organisational direction or governance issues. Common themes are of the precariousness of many small organisations, a lack of good line management for managers, the isolation of some individuals and the consequent lack of feedback they have on their own performance. Some organisations are in a better position, but they often want to move forward. The need for culture change is often an issue for all types of organisation.

### Desired outcomes

In terms of what the managers were seeking from mentoring, there are strong shared themes of managing their workload (rather than their time), more strategic working and working with Boards. At the commencement of the mentoring relationship, many talked of their stress and were demonstrating stress-based reactions to difficulties and crisis management. There is a clear link between the personal and professional imbalance described for individual managers and the wider 'health' of their organisations.

Viewed from a distance and in hindsight, it is evident that they almost all would benefit from greater self-care, but that the time and space to stop and reflect sufficiently to recognise this need were universally lacking. For many the mentoring offer appears to have come at the right time.

### The value of the mentoring process

Overwhelmingly mentees have valued the time with someone 'without an agenda'. They have valued an independent source of confidential support and appear to have been able to develop trust in the relationship with their mentor in a relatively short time. There is a strong shared theme of mentoring providing a structure of a 'safe space to think'.

Mentors themselves have been committed and flexible. They have provided support and challenge, they have listened and helped the mentees to ask themselves questions, rather than provide solutions.

Some mentees have valued someone who knows their sector; this 'domain knowledge' seems to provide a shorthand way to by-pass early discussions about terminology and norms. However, other mentees explicitly wanted time

with someone who is not of their sector; these were usually the faith based managers. This may be related to the small size of the faith sector and the need to be confident of confidentiality.

The matching of mentors and mentees is an important part of the success of the programme. These are important judgements to make and illustrate the importance of an initial interview to scope out the issues and likely needs and concerns, before matching mentees and mentors.

### **Outcomes for managers**

Six sessions is a relatively short time in which to establish positive working relationships and make progress, but there are a number of examples of how the process has been helpful. The case studies suggest that most mentees were in a much better place by the conclusion of the programme.

Mentees have used the time differently; for some the value was in how it simply enabled them to stop and think. Some used it as a sounding board, a space to practise what they might do or say with others. The space sometimes provided a sense of perspective in relation to their work or themselves. The early accounts convey a strong sense of overload, perhaps born of a mindset that as a manager 'I should/can sort it all out', yet many of the problems they were facing were complex and were unlikely to be solved through the usual 'tried and tested' methods of an individual manager.

Some valued the feedback about themselves that they got; perhaps seeing themselves and their achievements in a new light. They became more confident and mindful of the destructive and dysfunctional patterns of their own behaviours. There are several examples of strategies to manage individual stress better and create a better work-life balance.

Some of these strategies grew out of a realisation that they did not have to tackle everything themselves; for example, some Board members were pleased to be asked to take more on.

There are examples of better communication, management of self and better time management, although the latter tends to be about a change of attitude to workload or sharing of tasks, rather than personal efficiency. A number of mentees have taken steps to find other sources of support from peers.

However, taking time out in this way did bring some things to a head. In some cases, the situation managers were dealing with got worse, either due to their own perspective having altered affecting their ability to continue to 'cope' or because of the worsening external environment.

There is a strong sense that mentoring is about learning how to learn and as such, is as much about the process and the journey as reaching a final

destination. Feedback from the mentors suggest that some mentees acknowledged this; several wished to continue the relationship or find similar alternative support after the six meetings. Equally some did not make much headway in the short time, whether because of personal defences, organisational constraints or other barriers.

There are challenges for mentors in relation to providing sufficient and robust challenge to the thinking of the mentees; some will not welcome it and some will not necessarily welcome honest feedback. Some mentees were also dealing with stressful personal issues and challenges and whilst the mentoring process could be 'therapeutic' it was not intended as a substitute for more personal support or therapy.

Whilst none of the mentees dropped out of the programme, some did not provide any feedback. This is probably partly a symptom of their 'busyness'. A few have left or changed their jobs; in itself this may not be a negative development, but it does mean that there is a lack of data on all mentees.

### **Organisational impacts**

Any behavioural and culture change project will take time; this programme has rested on an assumption that individual learning will have organisational impacts.

The working logic model suggested that mentoring should lead to a reduction in stress-related absence from work for staff and managers; this may not have been a good indicator in a sector where stress may not become manifest by *absence* of managers. Whilst there was some sickness absence, the signs of stress were perhaps evident in more routine, everyday, default ways of working to 'keep the show on the road'. Encouragingly, there are signs that some managers were beginning to recognise this; perhaps a necessary first step to longer term individual and organisational health.

There is some evidence of better working relationships with Boards and a beneficial impact on working relationships with staff, including on supervision and team management. Whilst there were also examples of the adoption of more effective management within organisations, an earlier sign of change might be seen as recognition of the need for self-care for managers as a precursor to any further broader business benefits.

Whilst there are a few examples of more effective business and strategic development and implementation, this has not been the primary focus.



## 5. Conclusions

This project has demonstrated the value of mentoring for the voluntary and faith sector in Scotland and of the potential for scaling-up this kind of support.

The programme appears to have been timely and able to meet a need for individual support to managers of small community based organisations, who are frequently professionally isolated in their work. The programme has also demonstrated the limits of mentoring as a way to address the underlying systemic issues within the sector. These relate to the funding position, the reliance on volunteers and board members, the personal commitment of many of the staff and managers to the work itself and the communities of which they are a part, and the cultural pressures and expectations to cope and not to prioritise self-care.

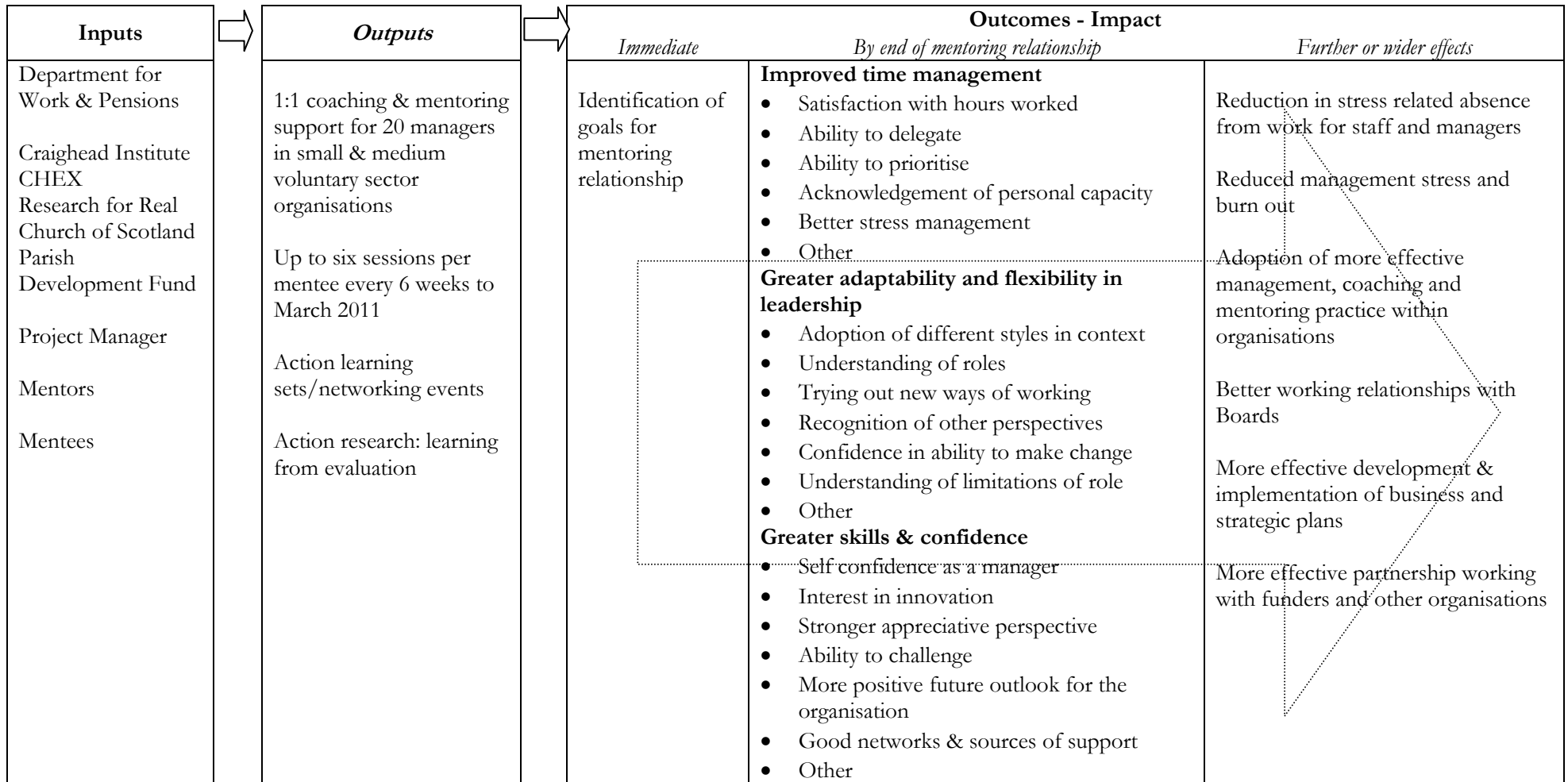
The addition of the two action learning sets has been a useful, if limited, addition to the programme. This has been seen as a valuable tool for wider use by some of the managers, although the lack of continuity and limited scale of the sets does inevitably limit their impact on the development of peer networks amongst mentees. Depending on the scale and geography of any future programme, there is likely to be scope to experiment with the use of action learning and other models that encourage experiential and peer learning.

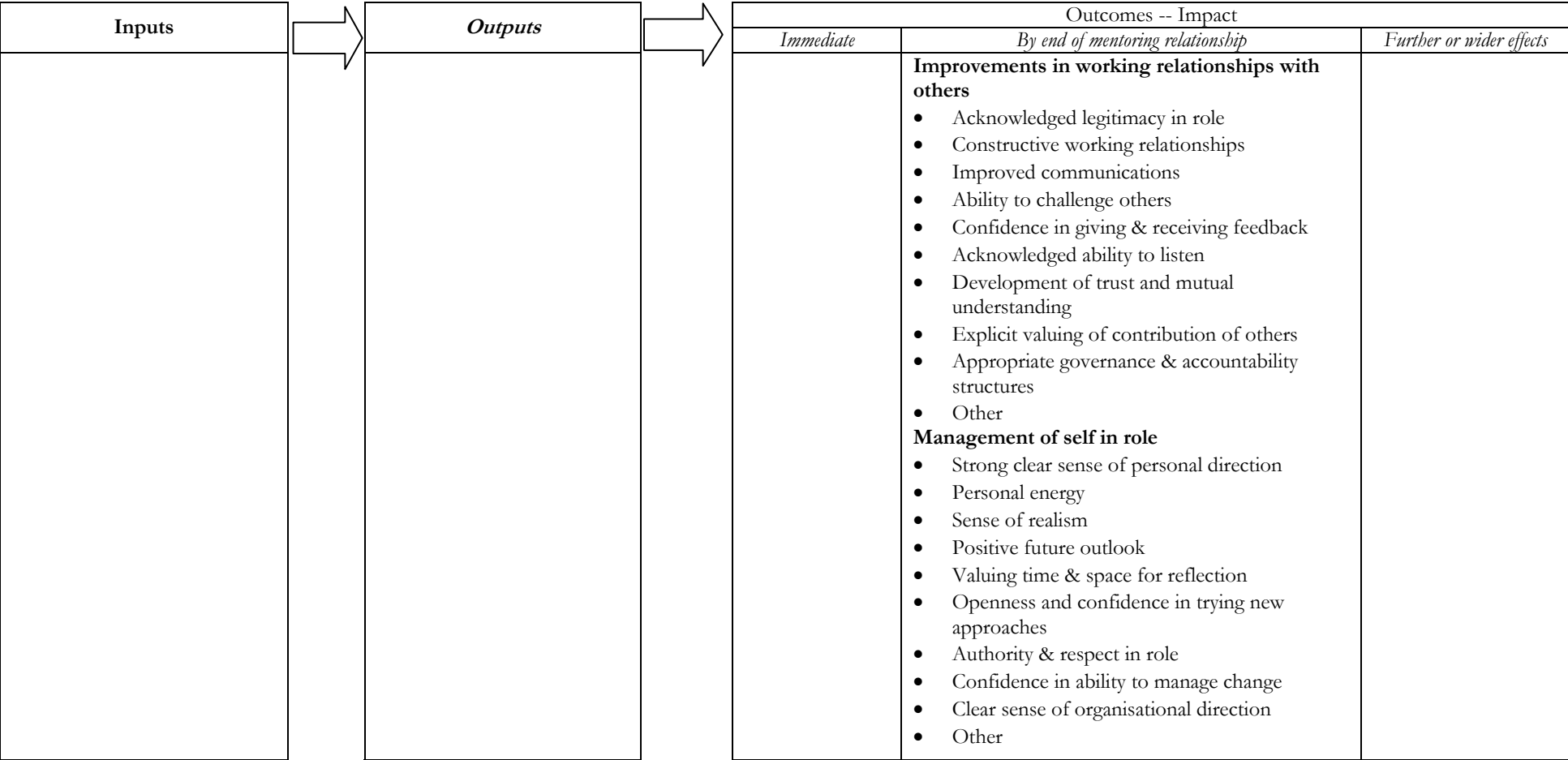
The partnership of the Craighead Institute, CHEX and the Parish Development Fund appears to have been an effective way to reach the intended beneficiaries of the programme. The partners have delivered a small scale but effective programme of mentoring, created supportive mentoring relationships that have produced recognition of the value of the process, rather than a dependency on the individual mentor.

Within the restricted parameters of the small-scale and relatively modest ambitions, the programme appears to have been good value for money. The programme has a strong bespoke element, with mentees and mentors able to make arrangements for meetings and timings that suit them both. As a way of delivering professional development, these costs would appear to compare favourably with training courses for chief officers or the cost to organisations of sickness absence, interim management and recruitment. There is a strong business case for continued funding; many of the organisations involved in the pilot are now seeking further funding to allow mentoring to continue.

Whilst the programme has demonstrated a limited 'ripple-effect' on the wider staff and others in the organisation, perhaps more significantly, it has achieved the necessary first steps on this pathway. By assisting managers to re-frame the way they view their situation, their role and the roles of others, and giving them greater confidence, the programme has potentially opened up greater possibilities for working together, enhance wider motivations and mobilise more collective efforts to achieve longer term individual and organisational health.

## Annex 1: Health Work and Wellbeing: Management Support Project Logic Model 2010





### **Assumptions**

Busy people can still make time for mentoring

Mentoring works best if people self-refer to show commitment and timeliness

A supportive mentoring relationship can be created

Mentors do not have answers: mentees can create their own solutions if given space and time

There will be a ripple-effect – an impact on staff and others in the organisation

Improved mental health and well-being of managers will influence other staff members

The result of all of the above will lead to better mental health and therefore a higher quality service at less personal cost to managers, staff and Board members

### **External Factors**

Recession and funding cuts

Loss of staff/staff turnover



## Annex 2: Outcome Indicators

### Time management

- TM1: I am satisfied with the typical amount of time I work
- TM2: I find it hard to delegate tasks to others
- TM3: I tend to focus on the urgent and immediate tasks in hand
- TM4: I'm not good at recognising when I am overloaded
- TM5: I have a range of strategies that work for me when I'm stressed
- TM6: Time management: other (please specify)

### Adaptability & flexibility

- AF1: I am able to apply different styles of leadership appropriately in different contexts
- AF2: I have a clear understanding of roles – both my own and that of others
- AF3: I like to use tried and tested solutions to problems
- AF4: I sometimes find it hard to see other peoples' perspectives
- AF5: I feel confident that I can make and sustain positive changes
- AF6: I am able to live with the limitations of my role and scope to influence change
- AF7: Adaptability & flexibility-Other (please specify)

### Skills and Confidence

- SC1: I am a self confident manager
- SC2: I like to try out new things
- SC3: I tend to focus on what I'm not doing well
- SC4: I usual have the confidence to challenge others when it's needed
- SC5: I do not feel optimistic about the future for the organisation
- SC6: I have good knowledge of networks and other sources of support
- SC7: Skills and Confidence-Other (please specify)

### Working with others

- WO1: I feel that others don't always recognise my right to be in this job
- WO2: I have been able to establish constructive working relationships
- WO3: I often feel we don't communicate well with each other
- WO4: It is not easy to challenge traditional ways of tackling issues
- WO5: I feel confident in being able to give and receive feedback
- WO6: I think others would say that I am a good listener
- WO7: I can take credit for being able to develop trust and mutual understanding
- WO8: My colleagues know what I value about their contribution
- WO9: The organisation has appropriate governance and accountability structures
- WO10: Working with others- Other (please specify)

### Management of self in role

- MS1: I have a strong clear sense of personal direction
- MS2: I have no energy to spare



- MS3: I have a realistic sense of what is actually achievable and what is not
- MS4: I feel pessimistic about the challenges ahead
- MS5: I give time to and value space for reflection for myself
- MS6: I feel open to and confident in my ability to try new approaches
- MS7: I have a sense of authority and respect in my role
- MS8: I doubt my ability to manage change effectively
- MS9: The organisation has a strong sense of the next steps
- MS10: Management of Self- Other (please specify)