

# Skills and Knowledge Workbook

## The Role of The Mentor & Coach

Please complete the workbook as part of your development to become a coach or mentor.

### NEXT STEP

- READ THE WORKBOOK
- COMPLETE THE QUESTIONS
- 'SAVE AS' PDF
- RETURN THE E-BOOK TO  
MENTORING@DISABILITYSHEFFIELD.ORG.UK

WWW.DISABILITYSHEFFIELD.ORG.UK  
0114 2536750

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A high-angle photograph of a person sitting at a desk, using a silver laptop. The person is wearing a dark blue long-sleeved top and a black and white patterned skirt. Their hands are on the laptop keyboard. The laptop screen displays a website with a blue and white color scheme. A blue semi-transparent overlay is positioned in the lower-left corner of the image, containing white text. The background is dark and out of focus.

## **This workbook is part 1 of 3 of your Coach or Mentor training.**

**To complete this stage: Read the workbook carefully,  
complete the questions in your own words and then return the  
workbook to us at [mentoring@disabilitysheffield.org.uk](mailto:mentoring@disabilitysheffield.org.uk)**

# ABOUT THIS WORKBOOK

This workbook was developed to:

- Develop Individual Employers or Personal Assistants to take on the role as a Mentor or Coach within the Mentor and Coaching framework.
- Explain the definitions of both mentor and coach.
- Explain the stages of the Mentoring and Coaching cycle.
- Identify the skills needed to become a mentor or a coach.

*\*If your employer or PA would like to contribute please clearly identify their comments.*

Who should complete this workbook?

- Employers or Personal Assistants, as part of your journey towards becoming a Coach or Mentor. (Employers may need someone to fill in this work book on their behalf).

Why should you do this workbook?

This skills and knowledge workbook helps us assess your current knowledge and experience. We can then decide whether you would best suit a coach or mentor role. This is step one of three on your path to becoming a Coach or Mentor.

Using this book:

1. Read through the pages carefully.
2. Complete the 12 questions in full.
3. Answer all the questions yourself, in your own words using this interactive PDF on your computer or tablet, in as much detail as you can provide. Create your answers from your own knowledge and experience.
4. Save the updated PDF and return to [mentoring@disabilitysheffield.org.uk](mailto:mentoring@disabilitysheffield.org.uk). If you are having problems using the interactive PDF, please call us to let us know and we'll arrange another method.

# WHAT IS COACHING AND MENTORING?

Before you become a Carer or Mentor, it's important that you understand the skills required and what the role involves.

## Mentoring

A Mentor supports an individual to think through their options or through an agreed process based on a shared experience. The Mentor should guide by

sharing their experiences and offering encouragement to assist actions and inform in an honest and objective way.



**Remember! A Mentor asks the right questions, where as a Coach has the right answers.**

## Coaching

A Coach has a formal role to give direct information and advice based on knowledge and experience. The coach

should guide and teach to help the individual decide what decisions to make or what process to take.

## When would a coach or mentor be needed?

- To **support** potential Employers or Personal Assistants.
- To **help** new Employers or PA's become **familiar** with their role.
- To **support** development of **knowledge and skills**, signposting to useful advice when necessary.



**Coaches and Mentors use their knowledge and experience to help people who are new to being an employer or PA.**

# WHAT KIND OF QUALITIES DO YOU NEED TO BECOME A COACH OR MENTOR?

- ## 1 Experience

Have evidence of good practice as an Individual Employer or Personal Assistant. Be an individual employer, be in receipt of Direct Payments or be a PA for a minimum of 2 years.
- ## 2 Interpersonal Skills

You'll need good communication skills and be able to offer an inclusive and accessible experience for the Mentee or Coachee
- ## 3 Personal Skills

Be a non judgemental person who promotes choice and independence.
- ## 4 Volunteering

You will have a voluntary relationship based on your knowledge, experience and skills.
- ## 5 Partnership

You will be matched with Employers or PA's who have similar experiences to you. You will be providing negotiated time set within clear boundaries.



**Are you an experienced PA or Employer who has the right qualities to share their knowledge and experience with others?**





## THE RELATIONSHIP BETWEEN THE COACH/ MENTOR AND THE COACHEE/MENTEE

- Be respectful
- Have agreed expectations
- Have an agreement for support in line with requests
- Have clear boundaries
- Have agreements of when and where meetings will take place.
- Sign post when questions are outside of your area of responsibility.
- Focus on the agreement and not take on the role of a counsellor.



# THE ROLE OF THE MENTOR & COACH

This will cover what your actual role will be as a Mentor or Coach.

- The role of the Mentor supports the Mentee to explore and think about what they want and need.
- The role of the Coach is to give direct advice and guidance to develop the knowledge and skills of the Coachee.
- Plan how to achieve this whilst providing shared experience and giving encouragement.
- Assist in an objective way.
- Relationship is Mentee/ Coachee focused.
- The role needs skills from your own experience.
- The role provides information to Coachees and Mentees. This could be signposting to further support.
- The Coach or Mentor should empower the individual to take charge of their own development.

A Coach or Mentor should support the Coachee/Mentee to look at different perspectives, develop a plan and take responsibility for their own development.



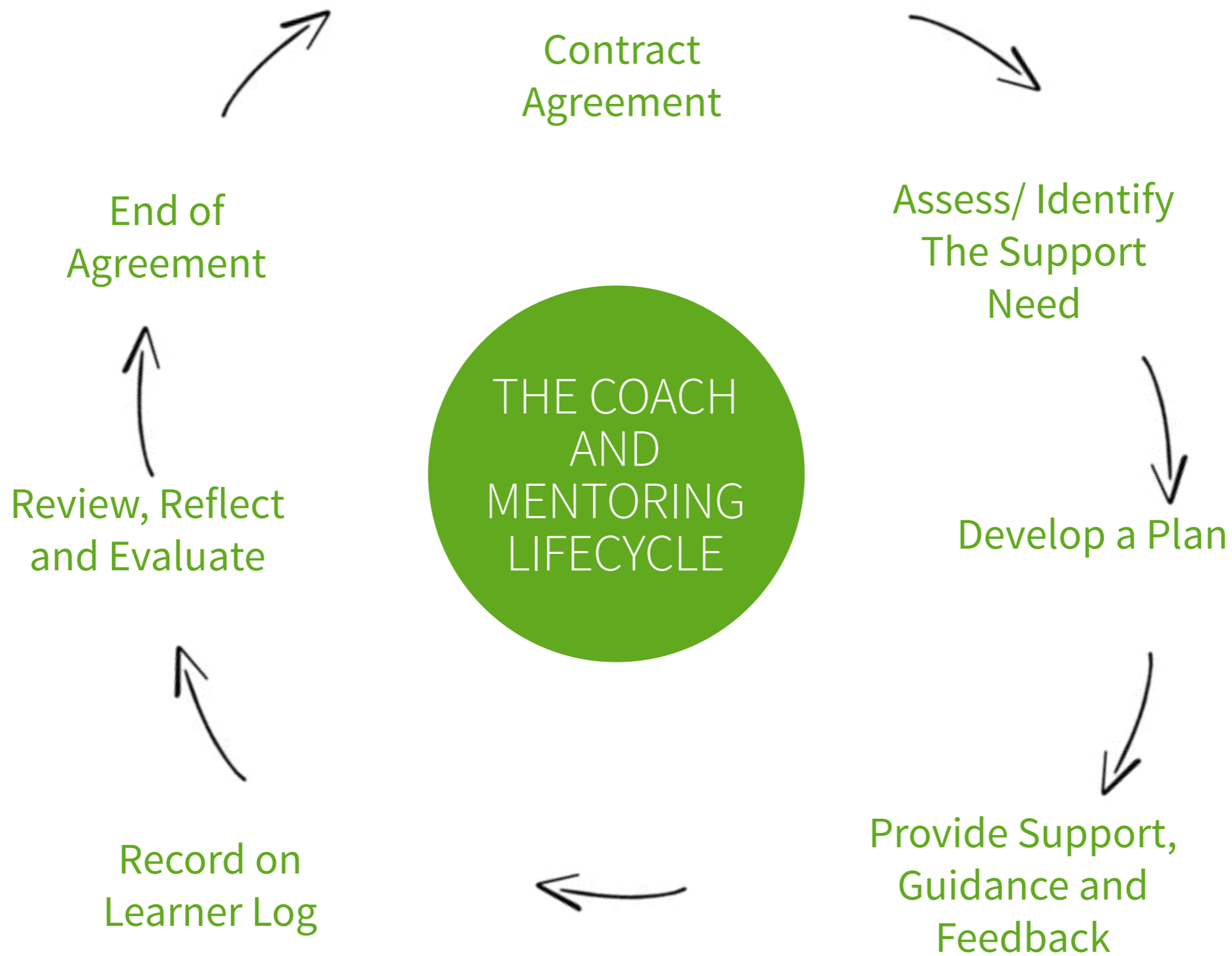


## WHEN YOU SIGN UP TO BE A COACH OR MENTOR YOU AGREE TO...

- Signpost people to a range of appropriate information to inform their choice and opinions.
- Work within appropriate levels of contact, with clear boundaries.

- Be an enabler or supporter and not a decision maker.
- Work within a confidentiality agreement (unless safeguarding is an issue).

- Attend peer mentor events across the year.
- Attend major developmental events.
- Neither give nor receive any gifts or gratification.



# COACH AND MENTORING LIFECYCLE

## STAGE 1

# Contract Agreement

## Guidelines

- Set a clear contract with details of the agreement made.
- Specify the level of commitment that the mentor is willing to provide.
- Identify specific areas of support that the Mentor/ Coach is agreeing to provide.
- Set a clear time frame for the support.
- Record and sign the agreement

## Tips!

- Set boundaries of confidentiality, more of this will be covered later.

# COACH AND MENTORING LIFECYCLE

## STAGE 2

# Assess & Identify Support Needed Assess & Identify

## Guidelines

- In the initial contact the Mentors, Mentees, Coach and Coachees need to work together to identify what the Coachee and Mentee actually needs.
- Assess why they need this support.
- How do they want to be supported?

**Clear  
communication  
is crucial for  
success!**

## Tips!

- Ask the right questions and listen carefully to the responses.
- Allow time and space, give the Coachee or Mentee as much time as they need.
- Try not to bombard the Coachee/ Mentee with too many questions at once.
- Try not to bring any of your own agendas.
- Keep focused! Stick to the agreed areas of support.

# COACH AND MENTORING LIFECYCLE

## STAGE 3

# Develop a Plan

## Guidelines

- Set out a plan for the task and actions needed.
- Identify who has agreed to do what.
- Facilitate and explore available options.
- Make sure the plan is realistic.
- Use questioning techniques and your own knowledge and experience to identify solutions and agree actions.

## Tips!

- Identify what resources are needed.
- Sign post appropriately.
- Record on the recording template what actions have been agreed.
- Listen to the individual and support them to set their own goals.
- Encourage self reflection.





## Remember!

A mentor asks the right questions to support the individual to reflect and reach their own solutions.

A coach has the right answers and more of a teaching role. The support required will tell you which technique is needed.

# COACH AND MENTORING LIFECYCLE

## STAGE 4

# Provide Support, Guidance & Feedback

## Guidelines

- Provide support and guidance.
- Give information when appropriate.
- This should be an exchange of ideas through discussion.
- Enable the individual to arrive at their own decision.
- Advice can be given if appropriate.

## Tips!

- Be careful when offering your opinion. It's important not to dictate what someone should or shouldn't do.
- Recognise the limits of your own knowledge, skills and experience and don't offer advice outside of this. Remember, wrong information can be harmful!
- Feedback needs to be specific, honest and reliable.
- Work at the individuals pace.

# COACH AND MENTORING LIFECYCLE

## STAGE 5

# Recording Template

## Guidelines

The recording template is needed to provide:

- A date record of each contact.
- A record of what is planned, what actions have been agreed and by whom.

# COACH AND MENTORING LIFECYCLE

## STAGE 6

# Review, Reflect and Evaluate

## Guidelines

- Review and evaluate what has been achieved against the set goal.
- Reflection - what has worked, what hasn't, what needs to be changed and how?
- What has to be done now?
- Has the relationship worked for the Mentee/ Coachee?

# COACH AND MENTORING LIFECYCLE

## STAGE 7

# End of Agreement

## Guidelines

- The initial contract is important as this specifies the support that you as the Mentor/ Coach have agreed to and the time frames for the support.
- Focus on the agreement throughout the contract so that everyone is clear when it is due to end.

## Tip!

- Be clear that you have reached the end of the agreed Mentor/ Mentee, or Coach/ Coachee relationship.

# WHEN GIVING FEEDBACK

Feedback is important to help your Coachee or Mentee develop and improve their skills, knowledge and practice. This helps an individual understand where their skills are and the areas they need to develop.



## **When giving feedback:**

- Give background to the situation.
- Give examples of what went well.
- Explain the positive impact of this.
- Explain the skills that the individual has demonstrated.
- Praise, encourage and reinforce!

## **If developmental needs are highlighted:**

- Give background to the situation.
- Give specific examples of what didn't work. Do this in a non-judgemental way.
- Discuss solutions and further improvements.
- Provide encouragement and support.
- Balance your feedback with what went well.

# CONFIDENTIALITY AND BOUNDARIES

What do we mean by confidentiality and boundaries, in the context of working with Coachees and Mentees?

\*Safeguarding issues are exempt from this.

## Privacy

This means the individual you're working with has a right to secure information about themselves and control what you know about them.

## Confidentiality

This means not disclosing anything you've learned about your Coachee or Mentee. Whether you've found out accidentally or they've directly told you - it stays between you and them. Unless you have permission to talk about it.





# QUESTIONS

Fill in your answers digitally using this interactive Workbook. When you have finished, 'Save as' the Workbook and email it back to us. We will then assess your answers to see whether you would be suitable for a Coach or Mentor role.

1. What can you bring to the Mentoring/ Coaching role, drawing from your own experience?

2. How has your experience prepared you for the role?

3. In your own words give a definition of **Mentoring**

4. In your own words give a definition of **Coaching**



6. Both Mentoring and Coaching has a **lifecycle**. Think about each stage of the lifecycle and identify **4 important things** you would need to do at each stage.

**Contract Agreement**

**Assess and Identify Support Need**

**Develop a Plan**

**Provide Support, Guidance and Feedback**

**Record on Learner Log**

**Review, Reflect and Evaluate**

**End of Agreement**







10. Give either a real or fictitious example of a situation where you have provided positive feedback and how you did this.

11. Give either a real or fictitious example of a situation where you have provided developmental feedback and explain how you did this.



# Thanks for completing 'The Role of The Mentor & Coach' Workbook.

Now please 'Save as' 'your name' Mentor and Coach Workbook. eg  
'JohnSmithMentorandCoachWorkbook' and email the PDF document back to us at  
**mentoring@disabilitysheffield.org.uk**

We will then review your answers and decide whether you would be best suited as a Mentor or Coach - or even  
a bit of both!

Connect with us on  
social media!

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