

## The mentoring toolkit: Setting up a formal mentoring scheme

This document provides key points to consider when setting up a formal mentoring scheme, including the benefits of formal mentoring schemes, and how they can be organised.

*August 2024*

This document is part of a toolkit to help organisations set up and run mentoring schemes.

Other documents in the toolkit:

- *Barriers to delivering a formal mentoring scheme and how to overcome them*
- *Mentoring and the attainment gap*

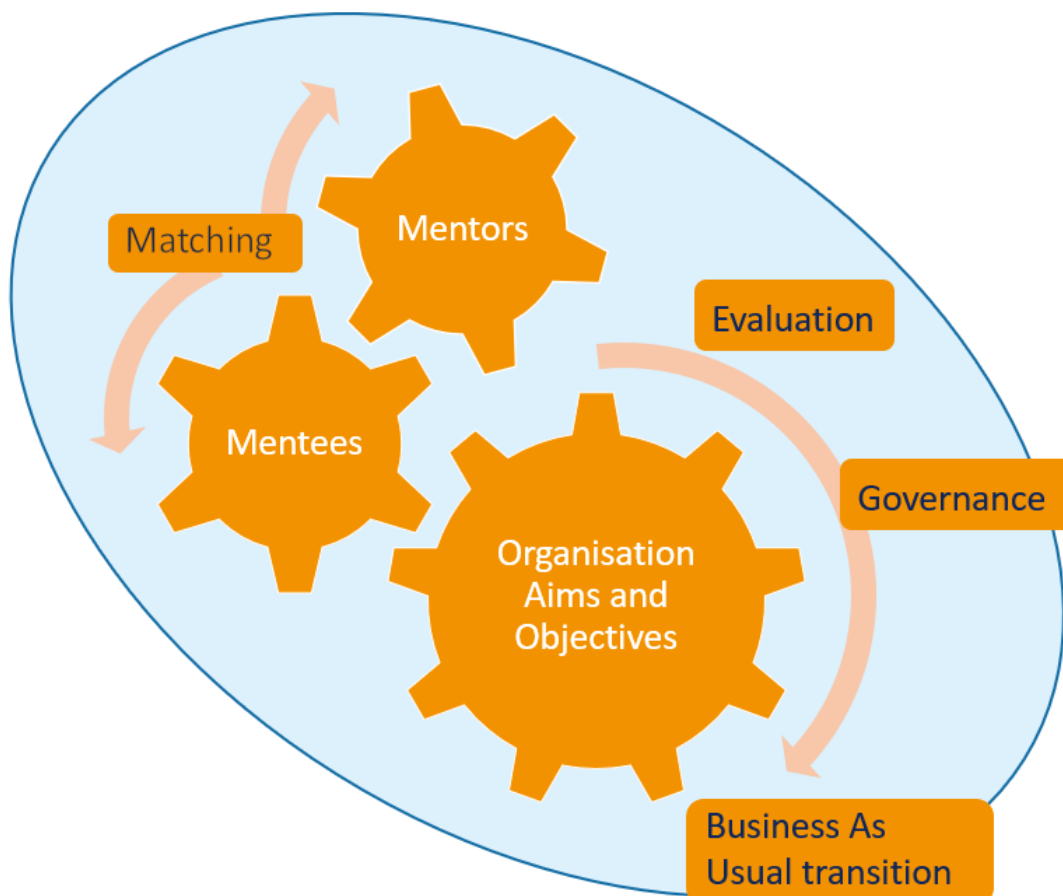
To access these and other resources [visit the toolkit on the GMC website.](#)

## Summary

- Formal mentoring schemes have been shown to be beneficial for all learners. They can also form part of a package of measures that may help to reduce the attainment gap in postgraduate medical training.
- To create this toolkit, we spoke to mentoring scheme organisers to understand what is involved in **setting up** and **running** sustainable formal mentoring schemes.
- This document provides background information on mentoring, including how mentoring schemes can be organised, the benefits of a formal scheme, and key points to consider when setting one up.

### The components of a formal mentoring scheme

This document covers key factors identified by scheme organisers across all the components of formal mentoring schemes.



---

# Contents

## Preface

- [What is mentoring?](#)
- [Who can benefit from mentoring?](#)
- [How is mentoring organised?](#)

## Setting up a formal mentoring scheme

- [Organisation aims and objectives](#)  
What do you hope your formal mentoring scheme will address in your organisation?
- [Governance and evaluation](#)  
What governance structures do you need to put in place?  
How can you evaluate your scheme?
- [Mentees](#)  
Who is the target audience for your mentoring scheme?  
How will you maximise uptake from your target audience?  
What support will mentees need?
- [Mentors](#)  
Who in your organisation will be acting as a mentor?  
What support is needed to recruit and retain mentors?  
What training will mentors need?
- [Matching](#)  
How do you plan to pair mentors with mentees?  
What resources do you need for matching mentoring pairs?
- [Transition to business-as-usual](#)  
What factors are important to make sure your mentoring scheme lasts?

## [Conclusion](#)

---

# Preface

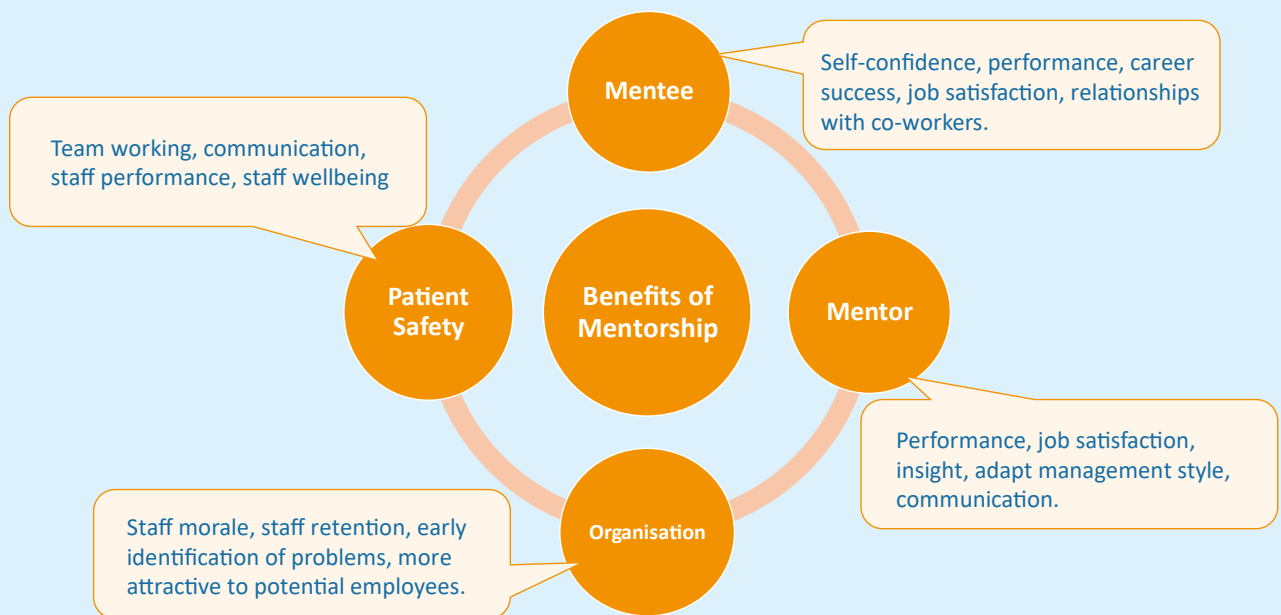
## What is mentoring?

The European Mentoring and Coaching Centre defines mentoring as ‘a learning relationship, involving the sharing of skills, knowledge, and expertise between a mentor and mentee through developmental conversations, experience sharing, and role modelling’.

## Who can benefit from mentoring?

There are many benefits of mentoring to mentees, mentors, and organisations.

- Mentoring has been shown to contribute to increased self-confidence, improved performance, and greater job satisfaction in mentees.
- Benefits to mentors include improved performance and job satisfaction, and the enjoyment of seeing their mentees progress.
- Organisations benefit from improved team working, and greater staff morale and retention, which contributes positively to patient safety.



Mentoring is important at all career stages and can be instrumental in supporting medical students and doctors through career transitions. Taking on the role of mentor can develop leadership skills and be part of continuous professional development (CPD).

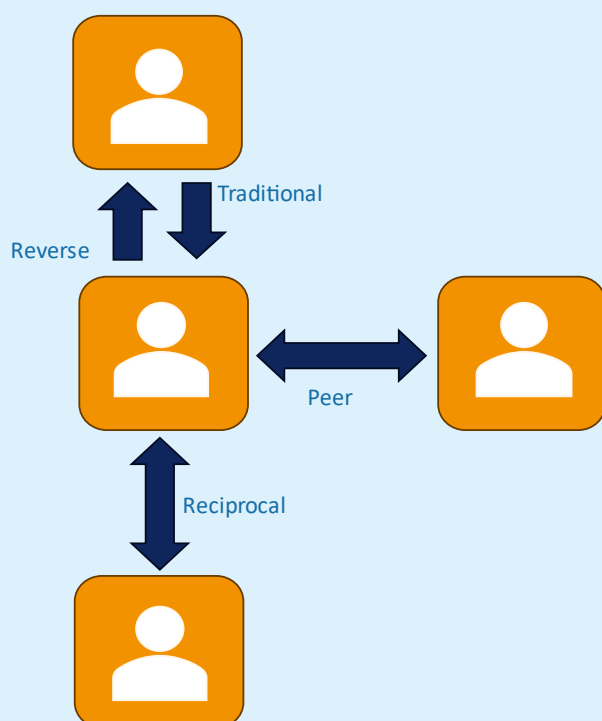
## How is mentoring organised?

### Formal or informal

Mentoring can be organised in a formal scheme by an organisation or group, or informally by the participants.

Formal mentoring schemes have been shown to be more accessible for people from ethnic minority backgrounds than informal schemes and have been highlighted as a key intervention to help reduce the attainment gap.

*For information on how mentoring may help reduce attainment gap see [Mentoring and the attainment gap](#).*



### The different types of mentoring

#### Traditional and near-peer mentorship

Traditional mentorship usually involves senior clinicians acting as mentors to trainees or more junior colleagues.

Near-peer mentorship involves other trainees or doctors at a similar career stage acting as mentors.

The aims and objectives of this style of mentoring are to help the mentee progress in their career.

Both models offer distinct benefits and can be useful for doctors at different stages of their careers.

#### Reverse and reciprocal mentorship

Reverse and reciprocal mentorship use the same skills as traditional mentorship but either reverse the traditional hierarchy (reverse mentorship) or focus on an equal exchange of skills, knowledge, and expertise (reciprocal mentorship).

The aims and objectives of reverse and reciprocal mentorship are usually focussed on changing organisational culture rather than providing guidance for individual mentees.

## What does this document cover?

This document focuses on setting up **formal schemes** of **traditional mentorship**.

---

## Setting up a formal mentoring scheme

This part of the document acts as a guide to setting up a formal mentoring scheme. It is important to note that while you may wish to consider all the points here, your scheme is likely to develop and evolve over time. Different factors may become more relevant as the scheme matures.

### Organisation aims and objectives

It is good practice to set out your organisation's aims and objectives when setting up a formal mentoring scheme.

This should include SMART\* objectives that can be used to evaluate the mentoring scheme.

It may be helpful to articulate the overall aims of the mentoring scheme which may be less measurable. Some examples of motivations for setting up mentoring schemes include:

- improving staff experience
- improving trainee outcomes
- increasing diversity in recruitment to certain specialties
- improving organisation culture
- reducing the attainment gap.

Well-articulated aims and objectives can be used to clearly describe the benefits of mentoring to your organisation, and secure financial backing if you need it.

The aims and objectives of your mentoring scheme may change as it transitions from pilot to business-as-usual. This may be as a result of evaluation, or feedback from participants or the organisation.

*You can find more information on the benefits of mentoring for mentees, mentors, and organisations in [Mentoring and the attainment gap](#).*

---

\*SMART objectives: Specific, Measurable, Achievable, Relevant, and Time-bound

---

## Governance and evaluation

When planning to set up a formal mentoring scheme it is important to consider governance and evaluation at the outset.

Governance is important to make sure your mentoring scheme has appropriate structures in place to support it. Evaluation is important to facilitate continuous improvement and provide evidence of benefit to the organisation.

### What governance structures do you need to put in place?

When planning your formal mentoring scheme, some important points to consider include:

- Who will be responsible for the set up and initial delivery of the scheme? Who will they report to, and when will updates be required? What initial documentation will be required by the organisation (for example, a business case)?
- Who will be responsible for acquiring funding for the scheme and for procurement (for example, if you conclude that matching software is needed)?
- How will you manage confidential data you collect, and who will be responsible for this?
- Who will be responsible for recruiting mentors and mentees, and what support will they need?
- Who will be responsible for the training of mentors and mentees? Will this be externally or internally provided?
- Who will be responsible for the day-to-day management of the scheme and act as a point of contact for any concerns?
- Who will be responsible for the evaluation of the scheme and continuous improvement against the organisations aims and objectives?

### How can you evaluate your scheme?

You may want to collect comparative data from participants before and after participation in your scheme. Considering evaluation early will enable you to collect data from participants before they start.

You may also wish to collect feedback throughout the scheme. The potential benefits are that early problems can be identified and solved, and aspects of the scheme can be adjusted.

Costs associated with ongoing evaluation are likely to come from the administrative burden. The payoff may be a more efficient and effective scheme that is less burdensome overall, however.

---

Any evaluation of the mentoring scheme should refer to the aims and objectives drawn up at the beginning of the project.

It may be that as you move through from pilot to business-as-usual, the aims and objectives of the scheme may change, and the focus of evaluation may need to change as a result.

This is another reason why it is important to clearly establish what those aims and objectives are.

Points to consider including in your evaluation:

- **Qualitative feedback from mentors and mentees.**  
Consider questions to assess organisational aims and objectives, satisfaction, utility in terms of personal aims and objectives and user experience (including use of mentoring platform or administrative support).
- **Qualitative feedback from groups that may be impacted** by the benefits and costs of mentoring including supervisors, educators, and organisations.
- **Demographic information** for mentors and mentees. This can be used to monitor and develop equity of access and diversity in line with organisational aims and objectives.
- **Quantitative feedback** utilising a variety of outcome measures such as annual review of competency progression (ARCP) outcomes, exam outcomes or Foundation Year 1 (FY1) preparedness. The best comparator group for this will likely be a previous cohort rather than those not participating on the scheme due to the risk of selection bias.

*Useful information on how to evaluate interventions can be found in [research we commissioned](#). A wealth of practical tools and guidance are also available on [TASO's website](#).*

---

## Mentees

Mentees are central to your scheme, so it is vital to design your scheme around their needs.

You may also need to think about how to tackle negative perceptions of mentoring, ensure equitable access, and what support will be needed for mentees to make the most of mentoring.

### Who is the target audience for your mentoring scheme?

Identifying the target audience for your mentoring scheme is central to its design.

- Doctors can benefit from mentoring at different stages of their career.
- Mentoring schemes can be designed to cater for different stages of training or specialise in a particular aspect.
- Similarly, mentoring schemes may specialise in a particular interest or demographic.

When considering who to target with your mentoring scheme, it is important to refer to your overall aims and objectives.

Some ways audiences can be selected to complement an organisation's aims and objectives:

- A mentoring scheme designed to increase diversity in recruitment to a specialty may target final year medical students and foundation year doctors from widening participation groups.
- A mentoring scheme designed to improve the experience of foundation year doctors might consider targeting all foundation year 1 doctors in the deanery.
- A trust or health board mentoring scheme designed to improve the experience of international medical graduate (IMG) doctors new to the UK might target all new IMG doctors arriving to the trust or health board.
- A mentoring scheme designed to improve the experience of trainees within a specialty may consider all trainees within that specialty.

---

## How can you maximise uptake from your target audience?

When considering how to maximise uptake among your target audience you may want to consider the following:

- How will you engage with your target audience and make them aware of the scheme?

Will you publicise the mentoring scheme through newsletters, journal articles, educational and clinical supervisors, social media, trainee networks, ambassadors, or another method?

- How will you overcome any negative perceptions of mentorship among your target audience?

Consider using the outcomes of any evaluation you undertake.

- How will you facilitate as many individuals as possible to take up mentoring?

Consider the accessibility of your scheme and mitigate any barriers including financial and time constraints.

*There may be barriers to individuals taking up mentoring opportunities. We have produced a companion document: [Barriers to delivering a formal mentoring scheme and how to overcome them](#).*

## What support will mentees need?

Most mentoring schemes provide some introductory training for their mentees which introduces the scheme and helps mentees get the most out of their experience.

Useful topics and resources you may wish to cover in training designed for mentees:

- Core principles of mentorship and mentoring models
- Skills such as open communication and self-reflection
- Mentoring agreement or contract, including frequency and duration of meetings as well as boundaries and ground rules
- Personal development plan or goal setting
- Signposting to resources
- Point of contact for problems

---

## Other types of support mentees may need

Mentees may also need support during their time on the scheme. Consider how you will engage with mentees, and how you will deal with any problems that arise.

You could consider:

- A midpoint group check-in with mentees to hear feedback on what is working well and what can be improved. Gathering mentees together as a group may have the added benefit of allowing like-minded individuals to connect and build a mentoring community.
- A point of contact for mentees if they encounter any problems, for example, with meeting their mentor or the 'personality fit'.
- An end-of-scheme meeting for mentees to feedback on what went well and what could be improved. This could be a good opportunity to conduct your evaluation and to recruit outgoing mentees to act as mentors in the future.

## A word on workloads

Some mentees may need support with their workload to benefit from mentoring. This may particularly affect those who are new to their role (including IMGs in their first post), those returning from a period out of training (for example following statutory leave or research) as well anyone who is struggling.

Consider whether it is possible to engage with supervisors or training programme leads to give protected time for mentoring.

The time commitment for the mentoring meetings will be small (usually one hour monthly) while the potential benefits for the mentee and the organisation may be significant.

---

# Mentors

## Who in your organisation will be acting as a mentor?

When deciding who in your organisation would be suitable mentors, it is important to consider the needs of your target audience in the first instance.

Mentors do not need to be the most senior doctors or those with teaching responsibilities or experience. Depending on the needs of your target audience, mentors could be junior members of the organisation and multi-professional.

Factors in deciding on your pool of mentors:

- **Career stage of your target audience:** Depending on their career stage, mentees may benefit from different expertise from their mentor.

Consider undergraduate and postgraduate training and career development transition points, and the demands on doctors at different stages of their career. For example, first clinical placement, first post as a doctor, deciding on specialty training, recruitment and CV building, examinations, time out of training, increases in responsibility and preparing for CCT.

- **Specific needs of your target audience:** Consider whether you plan to target a specific group for your mentoring scheme.

Are there particular areas of wider expertise that would benefit your target audience? For example, experience of balancing education, research, and leadership with clinical practice. Are there areas of extracurricular or life experience that would benefit your target audience, such as balancing caring responsibilities or a portfolio career?

- **Personal development needs of potential mentors:** When deciding who might be suitable mentors for your scheme, consider the benefits for mentors as well as mentees. Participating in near-peer or traditional mentorship can be a development opportunity for mentors, who can evidence the leadership and reflective skills gained in their portfolios.

- **Geography:** Consider whether to offer your target audience mentors from within their employing organisation or access to external mentors from across the UK.

There are perceived benefits of both models. A widening of perspective and increased honesty in conversations for geographically distant pairings, versus the option of in-person meetings, developing a sense of community, and an in-depth understanding of local organisations for geographically close pairings.

- **Inclusion and diversity:** For your mentoring scheme to be accessible to a diverse group of mentees, it is important to consider how to maximise the diversity of your mentor pool. Consider potential mentors from different professions and different levels of seniority.

---

## What support is needed to recruit and retain mentors?

Recruiting motivated mentors is essential for your mentoring scheme to be successful.

Consider:

- **How to advertise** opportunities to be a mentor: Many schemes rely on word of mouth and are reliant on a small number of dedicated individuals reaching out to colleagues.

Consider how to reach a diverse range of potential mentors.

Some possibilities include professional meetings, educational meetings, trust or specialty meetings, integrated care systems, professional literature or newsletters, social media, and special interest groups or networks.

- **How to incentivise** members of your organisation to sign up as a mentor: Some potential mentors may have concerns about becoming a mentor and how this would fit in with their other responsibilities.

Some incentives you may consider include dedicated time within timetables or rotas, CPD points or certificates, advertisement of the benefits of mentoring for mentors, and discounts or other advantages relevant to your organisation (for example, early bird discounts for conferences).

Once you have recruited your mentors, it is important to plan how to retain them:

- **Continued incentives:** See above for ideas on how to incentivise individuals to continue with mentoring.
- **Circular mentorship:** Individuals who start off as mentees within your scheme are encouraged to become mentors later.

Mentees who have found the experience valuable may be particularly enthusiastic about the opportunity to continue with the scheme as a mentor.

- **Evaluation of the mentor experience:** When evaluating of your scheme, collect feedback from mentors to learn about their experience to drive improvements.

---

## What training will your mentors need?

Before matching mentees to a mentor, it is good practice to provide the mentor with training to give them an understanding of mentoring and teach them mentorship skills.

You might consider producing your own training or utilising training from other organisations. A wide range of mentoring training is available.

Wider literature on workplace mentoring suggests initial training should include:

- Core principles of mentorship and mentoring models
- Mentoring skills such as active listening, relationship building, and feedback
- Mentoring agreement or contract (including frequency and duration of meetings as well as boundaries and ground rules)
- Signposting to resources
- Point of contact for problems.

When deciding on the training your mentors will undergo, it is important to balance the quality and breadth of training with the time investment required of your mentors. Innovative delivery methods, such as online courses, may be more convenient for mentors.

It is also important to consider where the costs of mentor training will lie. Do you plan to cover the costs through the mentoring scheme, or will you expect mentors to utilise their CPD budgets? Consider the implications of training and cost on access, inclusion, and diversity.

Finally, consider what ongoing professional development your mentors will need, and how often they may need to refresh their training. Consider the added opportunities of regular mentor training, including the opportunity to meet like-minded colleagues and build a mentoring community.

---

## Matching

Matching of mentors and mentees is likely to constitute the most significant resource investment for the mentoring scheme. This may be in terms of time for an administrator to manually match pairs, or the financial cost if a mentoring platform is used.

### How do you plan to pair mentors and mentees?

Different models of matching mentoring pairs exist, each with their own advantages and disadvantages. Consider the target audience of your scheme and which method of matching is most appropriate for them:

- **Assigned match:** Mentors and mentees provide information about themselves and what they hope to get out of mentoring. They are matched on shared interest. This can be done manually by an administrator or using software to match by key phrases.

A benefit of assigned matching is that mentees do not need to approach mentors and are therefore more likely to take up the offer. People from underrepresented groups may feel they lack social capital to approach mentors, and assigned matching negates this.

Assigned matching may also help in smaller schemes, where the participants are personally known to the organiser, allowing bespoke matching.

A downside of assigned matching might be that mentors and mentees do not feel engaged in the matching process and so may be less invested in the relationship.

- **Mentee choice:** Mentors provide profiles and mentees can approach mentors they feel will be most suitable.

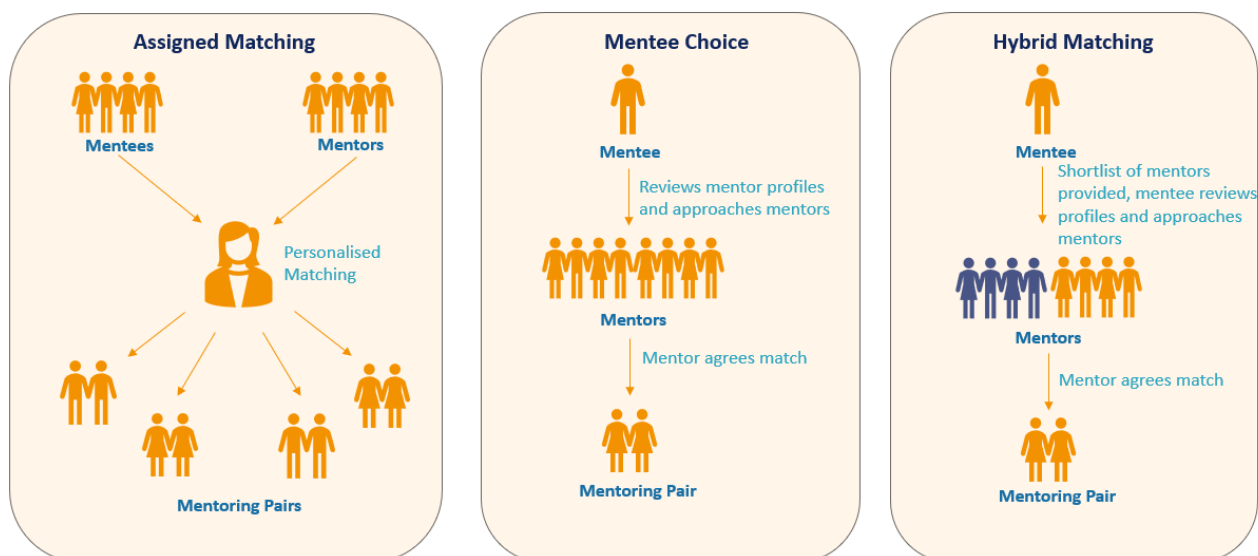
The benefit is that mentees have a choice in their mentor and may be more invested in the process.

Potential downsides include the problem of popular mentors having too many requests, taking on too many mentees, or having to turn people down. People from underrepresented groups may be hesitant to approach mentors due to perceived lack of social capital, and this may deter them due to a lack of representation in the mentor population.

- **Hybrid matching:** A hybrid scheme suggests a small number of potential mentors for each mentee, and the mentee is then able to choose. A hybrid model may also allow mentees to approach mentors in the first instance but allow administrators to make a direct match if the mentee is not able to secure a match (due to mentor capacity or other reasons).

A hybrid model may benefit from the advantages of both matching systems but might also suffer from the combined downsides.

## Methods for matching



## What resources do you need for matching mentoring pairs?

Different methods of matching and administering the mentoring scheme will require different resources. Most mentoring schemes will require different combinations of support.

- **Administrative support:** This may be needed for matching pairs as well as the day-to-day administration of the scheme.

A benefit of manual matching with administrative support may be a lower financial cost compared with a software option. Another is that the mentoring scheme can be made bespoke with personal input for mentors and mentees, which may be beneficial.

The downside is that the time commitment for administering the scheme may be significant depending on the size of the scheme. This may foster reliance on a key individual, hindering transition to business-as-usual.

- **Software:** There are commercially available mentoring platforms, or bespoke software can be developed to support the scheme.

The advantage of mentoring software is the reduction of the administrative burden. It may also include features that improve the experience of using the scheme. For example, there may be room for resources, the ability to schedule meetings or meet virtually, and a point of contact for participants should any problems arise.

The downside of commercial software is the financial cost.

---

## Transition to business-as-usual

Many organisations we engaged with while developing this toolkit mentioned the transition to business-as-usual as a significant challenge.

To reduce the risk of losing momentum once out of the pilot phase, it is important to consider early on how your scheme can be embedded into normal working practice.

### Factors to make sure your mentoring scheme lasts beyond the pilot

- **Organisational and senior leader buy-in**
  - Plan for ongoing evaluation, so you can demonstrate the scheme's worth.
- **Your BAU plan relies on organisational rather than individual responsibility**
  - A formal mentoring scheme should be an organisational offering that continues beyond any individual's involvement or employment. Make sure it has governance.
- **Plan for funding and administrative time**
  - Have clear information about the funding and time commitments the scheme requires.
  - Plan how and when you will seek commitment for long term funding of the scheme to enable purchase of a mentoring platform or fund staff time.
- **Plan for ongoing recruitment and training of mentors**
  - Who will train mentors and how? And how will training be accessible and consistent?
  - What do you need to do to maintain buy-in from the organisation to encourage and support staff to act as mentors?
- **Plan for regular, ongoing promotion of mentoring to potential mentees**
  - What information do you need to make available to mentees? When and how will this be done? (For example, could it be a part of their induction?)
  - What do you need to do to maintain buy-in from the organisation to encourage and support individuals to take up mentoring opportunities.

*For more guidance on creating a sustainable scheme and overcoming obstacles see: [Barriers to delivering a formal mentoring scheme and how to overcome them.](#)*

---

## Conclusion

Mentoring is beneficial for mentees, mentors, and organisations. This document has highlighted some key factors to consider when setting up a formal mentoring scheme.

For more information on how to overcome barriers, and how mentoring can form part of a package of measures to tackle the attainment gap, please see the companion toolkit documents [Barriers to mentoring](#) and [Mentoring and the attainment gap](#).

---

Produced at the GMC by a Marx clinical fellow, 2024

For further information email [fairtrainingcultures@gmc-uk.org](mailto:fairtrainingcultures@gmc-uk.org)

[www.gmc-uk.org/da](http://www.gmc-uk.org/da)