Career Mentoring Programme
Terms of Reference

– A Guide for Mentors

– An initiative from CIMA Gauteng, South Africa

“The greatest good you can do for another is not just to share your riches but to reveal to him his own.”

Benjamin Disraeli
# Table of Contents

Purpose .............................................................................................................................................. 4
Objectives of Career Mentoring ........................................................................................................ 4
Scope .................................................................................................................................................. 4
Definitions .......................................................................................................................................... 5
Benefits of mentoring (to mentors) .................................................................................................. 5
Benefits of being mentored (to protégés) ......................................................................................... 5
Requirements .................................................................................................................................... 6
The mentoring process ..................................................................................................................... 7
Roles & Responsibilities .................................................................................................................... 10
  The role of the mentor is to ............................................................................................................. 10
  The role of the protégé is to .......................................................................................................... 10
  The role of the Mentoring Committee ......................................................................................... 11
  The role of the Mentoring Coordinator is to ............................................................................. 11
Administrative arrangements ........................................................................................................... 12
  Entering the scheme as a Mentor ............................................................................................... 12
  Matching mentors and protégés ................................................................................................. 12
  Enquiries and contact details ....................................................................................................... 12
  Reports and meetings .................................................................................................................. 13
  Exiting the scheme ...................................................................................................................... 13
CIMA career mentoring program disclaimer / Code of conduct ............................................... 13
Appendix A – CIMA Gauteng Career Mentor Registration ............................................................ 14
Appendix B – CIMA Gauteng Career Mentee/Protégé Registration .............................................. 15
Appendix C – How to mentor ......................................................................................................... 16
Appendix D – Additional resources ............................................................................................... 18
Appendix D - Glossary of Terms ..................................................................................................... 19
  CIMA .......................................................................................................................................... 19
  CPD .......................................................................................................................................... 19
  PER .......................................................................................................................................... 19
Purpose
As a guide to mentors on the CIMA career mentoring programme, the purpose of this document is to:

- outline what the career mentoring programme entails (i.e. the objectives-, scope-, terms and conditions of, as well as requirements for participating in, the programme)
- outline what the career mentoring process entails
- identify the stakeholders in the mentoring process and explain their role and responsibilities
- suggest the resources available from CIMA that supports the mentor in their role

Objectives of Career Mentoring
The objectives of the career mentoring program are to:

- assist students/members (protégés) to adapt and reach their full potential in the South African employment marketplace;
- facilitate conversion of students who have completed their studies and are in the process of completing their Practical Experience Requirements (PER), into membership (i.e. ACMA);
- facilitate conversion of Associate members (ACMA) into Fellow membership (FCMA); and
- assist members to comply with the rules of engagement of being a CIMA member, which includes CPD requirements, ethical code of conduct and branch responsibilities as member.

Scope
The mentoring program could include but is not restricted to:

- increasing protégés’ understanding of the South African workplace culture, job market and industry trends;
- guidance, either directly or through partner resources to improve candidate profile;
- career guidance and goal setting;
- guidance on obtaining CMA accreditation or CIMA membership (i.e. Practical Experience Requirements (PER));
- CPD and other ACMA responsibilities…; and
- involvement in branch activities…

The career mentoring program is NOT:

- a job search or job placement program, although career guidance is offered;
- a student mentoring programme, i.e. mentors will not provide any tutoring or mentoring to students on how and what to study (a separate but complimentary student mentoring programme exists with this purpose); or
- a coaching programme, although some coaching might be inherent in the mentoring process.
Definitions
The definitions of terms used in this Guide, can be found in Appendix D – Glossary of Terms

Benefits of mentoring (to mentors)
- Ability to record mentoring as a part of continuous professional development (CPD) in the CIMA Planner
- Sharing knowledge and experience, and building upon other people’s ideas
- Personal fulfilment from investing in others by assisting in the development of another professional and enabling another professional to reach their goals
- Enhancement of own leadership skills, communication, teaching and coaching skills
- Demonstrate the ability to supervise or manage a less experienced professional
- Giving back to the profession
- Increased professional networking opportunities

Benefits of being mentored (to protégés)
- Access to the expertise of a CIMA mentor
- Guidance on how to access CIMA resources and CIMA partner resources
- Increased professional networking opportunities
- Development of Soft skills
- Ability to record mentoring as a part of CPD in the CIMA Planner
- Reflect on own professional development, identify gaps and track progress
Requirements
The eligibility criteria for becoming a CIMA career mentor, includes satisfaction of all the following criteria:

In general the person must

- reside or work in Gauteng Province;
- be an ACMA/FCMA in good standing;
- have at least three years of work experience as an ACMA or already an FCMA;
- have a sincere interest to participate in the mentoring programme; and
- agree to share some personal information with the CIMA mentoring committee/protégé as disclosed on the mentor application form. This will be used for the purpose of matching the mentor with a protégé, facilitating the program and for statistics used by the mentoring committee.

With regards to time the person must

- agree to commit to the program for at least six (6) months;
- commit to spending up to four (4) hours per month with the protégé, including face-to-face meetings, telephone conversations and e-meetings; and
- attend mentor training meetings as needed.

In terms of administration the person must

- be willing to communicate regularly with the Mentoring Coordinator;
- ensure the Protégé maintains documentation of meetings held with highlights of discussion (reference standard form); and
- submit activity information to the coordinator (progress tracking) as needed.
The mentoring process

Commencement: Mentor and protégé applications are processed, orientation/guides are provided where applicable, introduction to the Mentoring Coordinator.

Matching: Mentor and protégé are matched by the Mentoring Coordinator based on professional backgrounds and profiles.

Initial meeting: Between mentor and protégé to get to know the protégé and agree on methods of communication, etc.

Mentoring: Setting of goals, agreeing on a list of activities, access to/guidance on resources and introduction to networking opportunities/professional contacts.

Review: Review of progress.

Closure: Formal closure with the protégé and feedback to the Mentoring Coordinator. If protégé wishes to stay in the program a new cycle commences.

Time frame: A maximum of six months for one cycle; could be terminated earlier if objectives are met.

Source: Adapted from CIMA Canada Mentoring Programme Guideline
Another useful model for presenting the process is based on the GROW model (normally used in mentoring):

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Establish Goals

Explore Reality

Generate Options

Agree Action, Wrap up
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Source: Sir John Whitmore, Mentoring for Performance: growing people, performance and purpose.

- During the first part of their meeting, the mentor and protégé focus on determining exactly what they want to achieve. This stage is about establishing expectations and goals. To this end, create an action plan containing SMART Goals
  - **Specific**: Goals should be stated in terms that are precise and clear. What exactly do you want?
  - **Measurable**: Goals should be measurable. How will we know when progress has been made or when you have achieved your target?
  - **Achievable**: Goals should be achievable i.e. within your reach. There should be a sense of progression.
  - **Realistic**: Goals should be realistic and relevant to your particular circumstances. What will stop you reaching your goal?
  - **Time related**: Goals should be set within a time frame and broken down into dated stages. When do you plan to have achieved your target?

- At least 50% of the meeting should be spent on the reality stage. Good questioning and listening skills will enable the (mentor) to define the issues that need to be addressed.
- Once the underlying issues are identified, the (mentor) should continue to ask questions so that the protégé can identify the available options.
- In the ‘wrap up’ stage, the actions should be determined. This final stage is sometimes described as ‘confirm the will to act’. It is about agreeing what specific actions the protégé is going to take away from the meeting.
The goals that are set and the subsequent evaluation of it can be documented on a simple worksheet such as the following:

<table>
<thead>
<tr>
<th>Protégé name</th>
<th>Mentorship programme</th>
</tr>
</thead>
<tbody>
<tr>
<td>Objective</td>
<td>State the objective</td>
</tr>
<tr>
<td>Standard targets</td>
<td>Break down the targets that, if met, will enable the overall objective to be met i.e. some form of measure that can be compared to the plan.</td>
</tr>
<tr>
<td>Assessment / evaluation &amp; feedback</td>
<td>Feedback from the protégé that the objective has been met (confirmed by the mentor).</td>
</tr>
<tr>
<td>Further recommendation</td>
<td>Corrective action can also be documented if actual performance versus the objective fell short.</td>
</tr>
</tbody>
</table>

For more information on the skills required, and worksheets that can assist in the mentoring process, please refer to Appendix B – How to mentor. Also refer to Appendix C – Additional resources, for useful videos on the topic of mentoring.
**Roles & Responsibilities**

**The role of the mentor is to**
- assist the protégé in setting realistic goals and objectives;
- gain understanding of resources available for the protégé and provide guidance to the protégé based on his/her needs; the mentor is a resource and advisor (the mentoring coordinator will provide guidance where to obtain the resources and material);
- introduce the protégé to CIMA and other professional networking opportunities;
- act as a sounding board and provide feedback to the protégé;
- allocate the expected time with the protégé and maintain communication and follow through on commitments;
- the mentor is not expected to do the protégé’s work;
- inform the Mentoring Coordinator immediately if you want to leave the program for any reason;
- advise the Mentoring Coordinator on the completion of the mentoring program and provide feedback where appropriate; and
- attend quarterly Mentor meetings to share experience, provide activity report and network best practices.

**The role of the protégé is to**
- assume equal responsibility for ongoing contact throughout the program;
- responsible to document meetings and close out report with input and sign off from Mentor;
- be committed; schedule meeting dates and keep commitments;
- prepare a list of questions before meeting with the mentor and follow up on your mentor’s suggestions and agreed next steps;
- “check in” periodically with Mentoring Coordinator to let him/her know how you are benefiting from the process or if you are facing any issues;
- inform the mentor and Mentoring Coordinator immediately if you want to leave the program for any reason or if you have reached your objectives;
- let your mentor know how his or her advice and feedback has contributed to your career goal-setting and achievements;
- appreciate that your mentor will not have all of the answers, but may be able to refer you to others who can help with specific concerns; and
- understand that the CIMA Mentoring program is not a job-placement agency or a job bank.
The role of the Mentoring Committee
The role of the Mentoring Committee (which will comprise the Mentoring Coordinator and all the mentors participating in the programme), will be to hold meetings every quarter, in order to:

- discuss best-practice;
- submit activity reports to the Mentoring Coordinator, who need to provide feedback to the Branch Committee; and
- discuss what time is spent on during mentoring meetings (part of quarterly feedback) challenges faced, extra material and development required as mentor.

The role of the Mentoring Coordinator is to
- submit summary activity report to the Gauteng Branch Committee;
- report on any issues of interest to the Branch Committee;
- receive and respond to queries from mentors and protégés about the career mentor programme;
- administer the database of mentors and protégés;
- liaise with the CIMA office with regards to mentor recruitment initiatives and link with Student Mentoring Programme;
- advise participants and interested parties on the program and provide guidance about mentoring
- match the Protégé with a Mentor based on preferences; and
- respond within 48 hours on mentor and protégé enquiries.
Administrative arrangements
As per the mentoring process, the following administrative processes need to be adhered to:

Entering the scheme as a Mentor
- To become a mentor, the mentor application form needs to be completed (Appendix C). This will be used for the purpose of matching the mentor with a protégé, facilitating the program and for statistics used by the mentoring committee.
- The Mentoring Coordinator captures the mentor’s details and confirms their registration on the database.
- The Mentoring Coordinator provides the mentor with orientation/guides where applicable.
- When a suitable protégé has been identified, the Mentoring Coordinator informs the mentor and protégé of the match, and provides the parties with their respective contact details.
- The mentor and protégé then agree with each other on an initial meeting, where they get to know each other and agree on methods of communication and the way forward.

Matching mentors and protégés
In order to be transparent about the matching process, this is how the Mentor Coordinator goes about matching mentors and students:
- The coordinator receives the application form;
- check that the mentor applicants are active members and fit the stated criteria;
- check that protégés who apply to be mentored have been invited to participate;
- Protégés are put on the list to be matched on a first come, first served basis;
- places available for mentoring are limited to the members who have volunteered and successfully applied to act as mentors;
- Protégé and mentor preferences are matched based on background details from the application form, such as careers or positions pursued, industry interests, etc;
- Protégés who have not secured a place are notified first. Then mentors and protégés that have been matched are provided with each person’s contact information.

Enquiries and contact details
All queries by mentors are addressed to the Mentoring Coordinator on CIMAmentorGP@gmail.com
Reports and meetings

- The CIMA Mentoring Committee will meet quarterly to facilitate best-practice sharing, provide feedback in the form of activity reports and raise any issues of concern, to be escalated to the Branch Committee or CIMA Office.
- Activity reports are to be submitted at the quarterly meeting (or directly to the Mentoring Coordinator, if the meeting cannot be attended)

Exiting the scheme

- If at any stage during the mentoring relationship, you are unable to continue with the arrangement, please notify the Mentoring Coordinator on CIMAmentorGP@gmail.com
- You will then be removed from the mentoring database (as applicable)
- The protégé will then be matched up with another mentor if available

CIMA career mentoring program disclaimer / Code of conduct

- Mentoring is provided by CIMA members who have put themselves forward on a voluntary basis for this purpose, in good faith, and not by CIMA itself.
- CIMA does not warrant or accept any responsibility for the delivery, quality or content of any mentoring service provided by a CIMA member, nor for any consequence of the giving or absence of such service.
- It is intended that mentors should offer advice to protégés concerning matters of best practice only and not technical advice. However, should a mentor agree to offer technical advice, both the mentor and protégé are acting at their own risk and CIMA cannot be held responsible for any such advice or for any consequences thereof.
- In all contacts with each other both mentors and protégés shall act in a manner befitting a CIMA member or registered student, and must bear in mind at all times the bylaws, regulations and other laws of the institute applicable to them.
- The CIMA Code of Ethics applies and professional conduct is expected from all parties involved in the mentoring program
Appendix A – CIMA Gauteng Career Mentor Registration

Date of Registration: __________________________
First Name: __________________________
Last Name: __________________________
Email: __________________________
Phone: __________________________
CIMA Contact ID: __________________________
Suburb and Town: __________________________
Preferential for Mentoring __________________________
CIMA Membership Status: __________________________
(ACMA/FCMA) __________________________
Current Position / Title: __________________________
Industry: __________________________
Work Experience (Years): __________________________

As per mentoring guidelines it is required that you commit 4 hours per month per Mentee/Protégé. The mentorship cycle for each Mentee/Protégé is 6 months.

How many Mentees/Protégés are you willing to mentor at a time? __________________________

Do you have any preferences that will assist the Mentorship Coordinator to find a suitable match for you to Mentor?

Signature: __________________________ Date of registration: __________________________
Appendix B – CIMA Gauteng Career Mentee/Protégé Registration

Date of Registration: ________________________________
First Name: ________________________________
Last Name: ________________________________
Email: ________________________________
Phone: ________________________________
CIMA Contact ID: ________________________________
Suburb and Town: ________________________________
Preference for Mentoring

CIMA Membership Status: ________________________________
(Student/Student with T4b complete/ACMA)
Current Position / Title: ________________________________
Industry: ________________________________
Work Experience (Years) : ________________________________

As per mentoring guidelines it is required that you commit 4 hours per month. The mentorship cycle is 6 months.

Do you have any preferences that will assist the Mentorship Coordinator to find a suitable Mentor for you?:

Signature:______________________________  Date of registration:______________________________
Appendix C – How to mentor
The guidelines below have been developed for the student mentoring programme. The idea behind including this process in the career mentoring programme is to borrow from the best practices of the student programme that has been in existence for 3 years.

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Worksheets</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is mentoring? How does one get started? What skills does a mentor need to be successful?</td>
<td>Reflect on your motivation and goals: set your expectations (PDF 230KB)</td>
</tr>
<tr>
<td>What is expected</td>
<td>What does a successful mentor look like? (PDF 182KB)</td>
</tr>
<tr>
<td>When preparing to become a mentor, think about your motivation and goals. What do you hope to get out of the process? This is also a time to consider what makes a successful mentor. What areas should you focus on in order to improve your mentoring ability?</td>
<td>Model for a mentoring relationship (PDF 185KB)</td>
</tr>
<tr>
<td>The mentoring process</td>
<td>The first meeting/correspondence: how to prepare (PDF 191KB)</td>
</tr>
<tr>
<td>Mentoring has a defined lifecycle. The first phase is starts, when you introduce yourself, build trust and rapport with the protégé by sharing your own CIMA experience. You then work together to set SMART goals.</td>
<td>“Standing alongside”: feedback and limits (PDF 177KB)</td>
</tr>
<tr>
<td>The next phase is standing alongside; when you work with the protégé according to the plan you created together. You will help keep them on track or investigate any obstacles they are experiencing.</td>
<td>Closure: final evaluation sheet (PDF 188KB)</td>
</tr>
<tr>
<td></td>
<td>Boundaries: guidelines, self disclosure and confidentiality (PDF 253KB)</td>
</tr>
</tbody>
</table>
The final phase is closure and it is time to end the mentoring relationship

**Setting boundaries**

Boundaries mean that there are limits to the mentoring relationship. You may decide some of them yourself, such as only answering queries at the weekend. Others are part of the scheme guidelines, such as not exchanging money with your protégé.

Consider what is in and out of scope for mentoring, for you and for the scheme. How much information are you comfortable disclosing and when is it appropriate to do so?

**Necessary skills**

Some of the skills needed to mentor effectively are acceptance, empathy, asking questions, and staying positive.
Appendix D – Additional resources

The following videos are available from CIMA’s website. These videos should help answer some of your questions and give you a better idea of how to mentor.

Part 1: Starting out

Part 2: First meeting

Part 3: Follow up

Part 4: Skills to work on

Part 5: Closing the relationship

The mentor featured in these videos, Ian Sterritt, is a personal mentor of high growth clients. He is currently pushing forward various initiatives in mentoring best practice, and is involved in several mentoring networks.
Appendix D - Glossary of Terms

**CIMA**
Chartered Institute of Management Accountants

**CPD**
CIMA Professional Development

**PER**
Practical Experience Requirements

**Mentor**
Mentoring is a process for the informal transmission of knowledge, social capital, and the psychosocial support perceived by the recipient as relevant to work, career, or professional development; mentoring entails informal communication, usually face-to-face and during a sustained period of time, between a person who is perceived to have greater relevant knowledge, wisdom, or experience (the mentor) and a person who is perceived to have less (the protégé)


**Coach**
A teaching, training or development process in which an individual gets support while learning to achieve a specific personal or professional result or goal.

**Protégé**
Person that receives mentoring (Mentee)

**Tutor**
A tutor is an instructor who gives private lessons. A tutor is not to be confused with a teacher who is employed in the education of groups.