



UPEN Mentoring Programme

Guidance Note 4: Setting goals and using management tools

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Overview

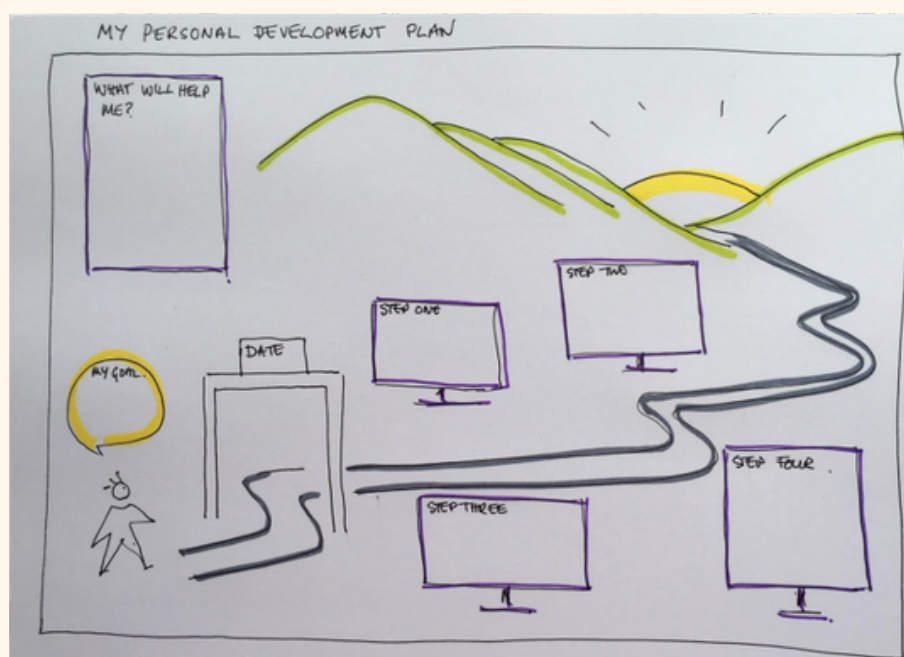
Mentoring is more than a friendly chat once a month. The UPEN mentoring programme has a clear cycle and mentoring within this context represents conversations with a purpose. That purpose may be helping mentees to overcome challenges, seek new goals, develop skills, solve problems and so on.

There are various tools that may be appropriate to help to structure sessions and set goals within the framework of purposeful conversations. This guidance note will introduce mentors to some tools that may be appropriate to utilise within the programme. Ultimately, though, it is up to the mentee as to whether they would value using a specific tool to track progress, achievements, and challenges against set goals.

Personal development plans

A simple way of recording goals and what your mentee would like to achieve within the timeframe can be set out in a straightforward grid listing goals and their importance, the mentee's current situation, options for progression, actions and timeframes. We've provided a template grid at the [end of this guidance note](#).

A personal development plan can also be a visual document:



Source: [One Million Mentors](#)



As a mentor you may also wish to set your own personal development plan to support your mentoring asking yourself questions such as:

- What is my goal for myself as a mentor? “I want to feel confident as a mentor.”
- What skills do I want to develop through mentoring?
- What regular actions might I take to support my development?

GROW: A goal-setting model

The GROW model is perhaps the most well-known management tool used in mentoring and personal development. It is a four-step model to take you from goal setting to actions. It can frame conversations over several sessions and does not have to progress in order, but allows a structured focus for mentoring.

The acronym GROW stands for:

Goal	What do you want to achieve?
Reality	Where are you now?
Options	What options do you have? What could you do?
What	What will you do next? What is your action plan?

The GROW model works by guiding the mentee through the stages utilising effective questioning and active listening, which we covered in guidance notes 2 and 3. GROW may be appropriate if mentee(s) are unsure of their goals and need some prompting to set appropriate ambitions for the mentoring cycle.

SMART goals are also particularly prevalent as a management tool for goal-setting. SMART goals give a clear framework for the goals and may be appropriate if mentees have specific tasks to be completed within a timeframe.



OSCAR: A solution-focused model

An alternative model to GROW is OSCAR which focuses more on solutions to be worked through with the mentee(s).

As the visualisation below shows, the framework is similar to GROW but there is more emphasis on options, action and reflection or review. This may be more appropriate if the mentee(s) have clear identifiable (and achievable) goals or problems to solve and wish to unpack options and consequences, focusing on how to overcome obstacles.

OSCAR concentrates on positive outcomes, so problems are acknowledged but the framework emphasises seeking solutions.



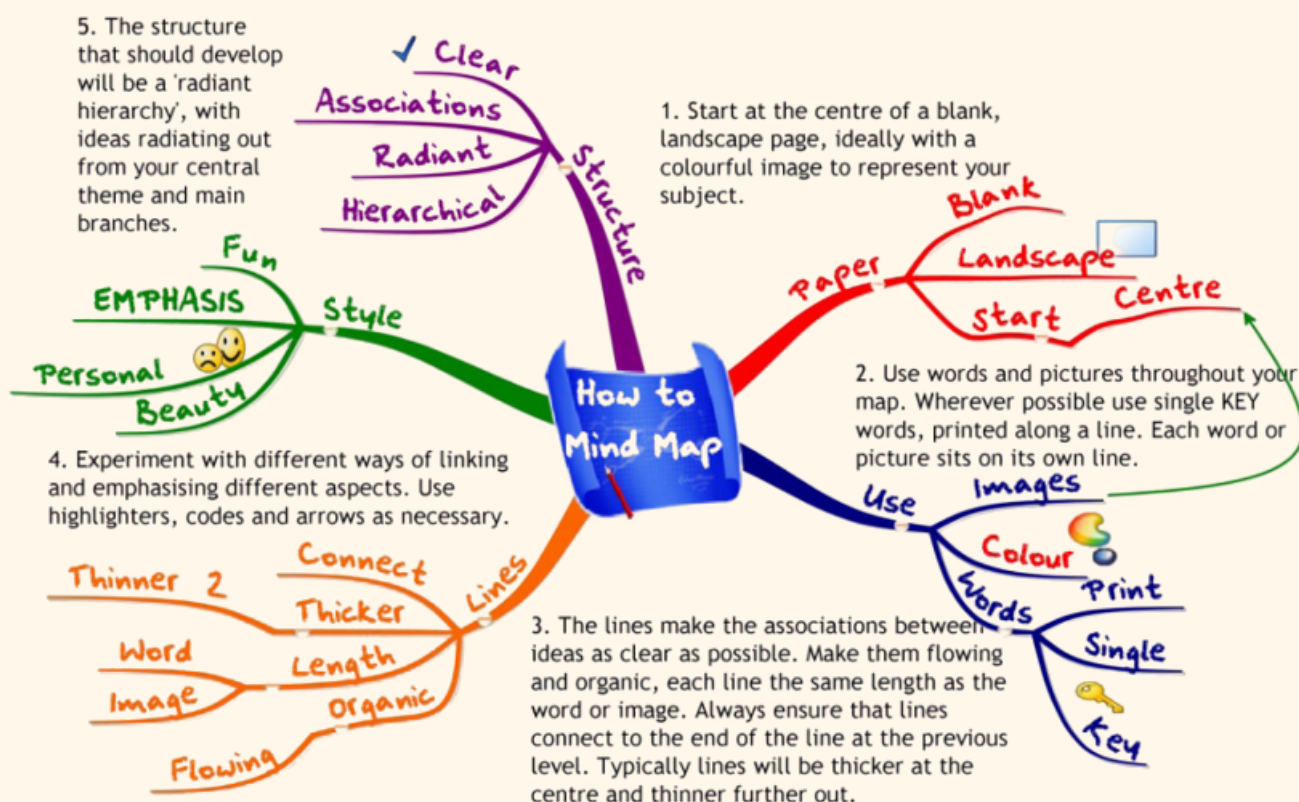
Source: NHS leadership programme [Effective mentoring a resource and guide for mentors](#), p23



More visualisation tools

Creative techniques can sometimes unlock tricky situations and open new perspectives. Mind mapping can be a good way to record and structure purposeful conversations.

Keeping a mentoring journal can also help both mentors and mentees reflect on what has been discussed during sessions. By jotting notes down after a session, it can give a little time for reflection and can include thoughts, feelings and insights about the discussion. It also allows the participants to write up experiences in their own way without prescriptive frameworks.



Source: Acevo's [Guide to peer mentoring](#)



Goals, targets and policy engagement

As this guidance has shown, there are a plethora of management tools that can be utilised in the mentoring relationship. The advantages of such tools are that they tend to facilitate purposeful conversations within a clear framework. This helps mentors guide discussions with clearer outcomes within set timeframes.

Within the UPEN mentoring programme, you may find some more helpful than others depending on the goals of mentee(s). Some may work better in one-to-one settings, while others work better in a group, or may be dependent on the expectations of mentees. Some mentees may have specific policy engagement tasks or goals to achieve within the timeframe, such as a new programme to deliver or a secondment to navigate successfully.

For others it may be that purposeful conversations are sufficient. Providing peer learning without set goals or targets and simply sharing experiences can help to support people in their role. In this case journals or visualisations may be a more effective way of marking progress and reflecting on challenges and achievements.





Personal development plan for mentees

Goal: What do I want to achieve?	Why is that important to me?	Where am I now in respect of that goal?	What are my options?	What will I do?	By when?	Result?

Signed by:
Signed by:

Date:
Date:

Source: UPEN version of resource by [One Million Mentors](#)



References

- [Video on goalsetting](#) from Study Work Grow [video]
- Helpful [video on using the GROW model](#) with a demonstration [video]
- The more sophisticated [OSKAR model is explained in more detail in this video](#)
- Helpful material from the University of Edinburgh on [asking questions](#)
- NHS Leadership Programme includes details on management tools including GROW and OSCAR: [Effective mentoring a resource and guide for mentors](#)
- [Exploring career mentoring and coaching](#), The Open University.
- [The UCL mentoring handbook](#) has good sections on listening and questioning plus a helpful template for a consensual contract.
- [Mindtools.com on the GROW model](#)
- For SMART goal setting, see [this University of Derby guide](#) and [this one](#) on goalsetting too
- There are a lot of mind mapping tools out there. [This site picks the top ones.](#)

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About UPEN

Universities Policy Engagement Network (UPEN) is a central space for academics, policy actors, and professional services staff who undertake and support academic-policy engagement. We champion academic policy engagement to strengthen evidence-informed policymaking in the UK.

UPEN is hosted by University College London (UCL), with co-chairs located at UCL, University of Huddersfield and University of Leeds.

UPEN Programmes

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