

How To Design and Run Your Own Mentoring Program

By
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How To Design and Run Your Own Mentoring Program

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Introduction

Mentoring grows ever more popular. Mentoring programs serve communities, businesses, government, the military, universities and schools around the world. Mentoring aims may be as diverse as keeping young people out of gangs in New York, succession planning in multi-national corporations, sending Dutch executives to work with community leaders in Africa – to build the skills of both, or career development for women and minority groups in government agencies in Australia.

Regardless of the purpose of mentoring, it represents the very best of human endeavours. Mentoring is a relationship for growth. Most mentors are motivated by the altruistic desire to assist someone. Most people who are mentored recognise their potential for an enhanced future. Whether it is skills for living, business success or career advancement, mentoring is a gift of shared wisdom that benefits both parties.

This book focuses on mentoring within organizations where benefits to the individual are magnified into strategic advantages for the institution. Mentoring may be a response to employment trends such as:

Increased career mobility - employees stay put for shorter periods;

Competition for talent – quality staff are lured to other organizations

Skills shortage/shrinking talent pool – fewer suitable employees available.

As a result, mentoring programs are intended to:

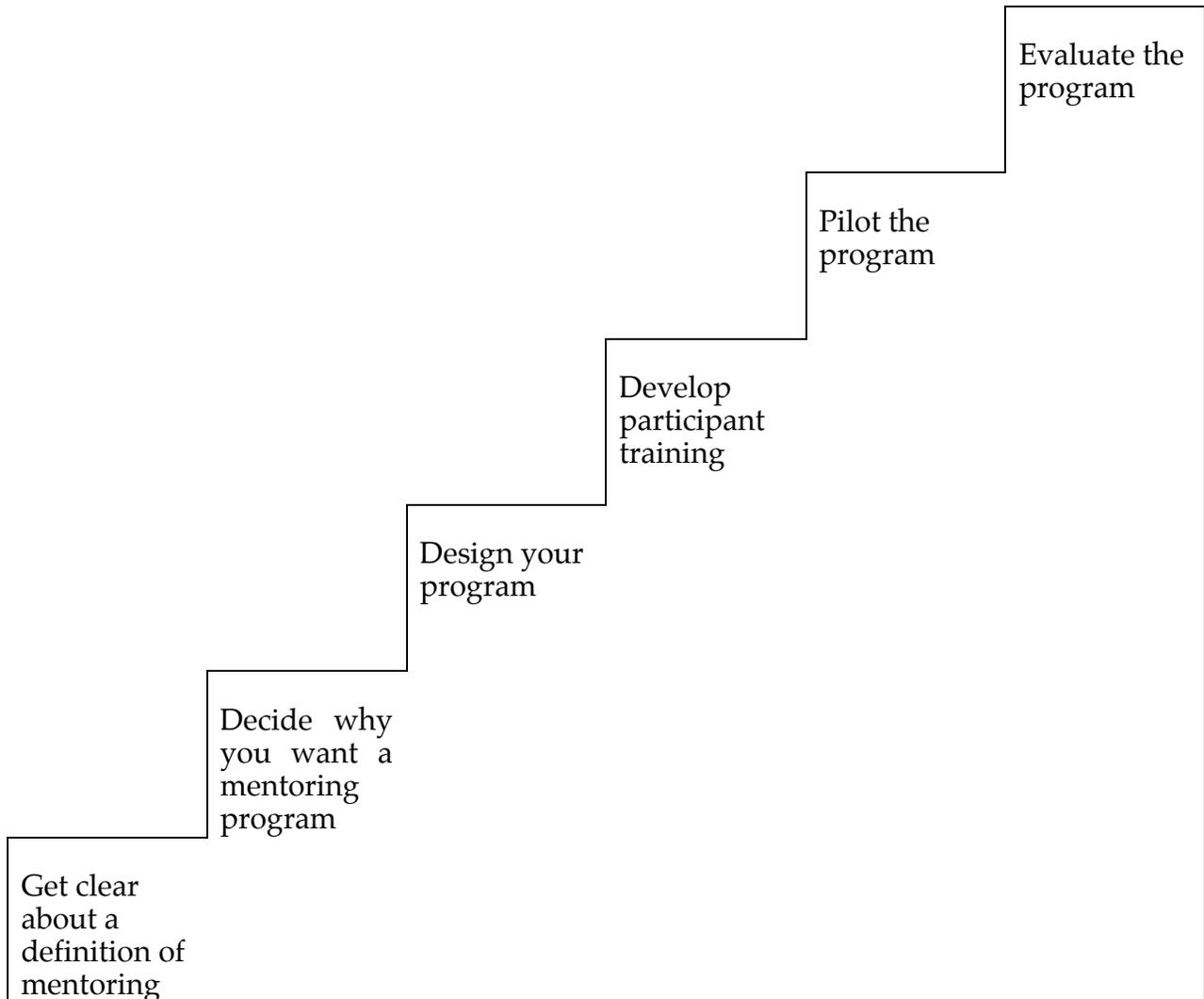
- Attract and retain quality employees;
- Develop individual and organisational capability; and
- Enhance performance and productivity.

However, intention is not enough. A mentoring program that achieves desired objectives is planned, supported and monitored.

How To Design and Run Your Own Mentoring Program

There is no "one-size-fits-all" mentoring program. You must tailor your program to suit your organization, your people and your objectives. Based on years of practical experience, this book describes how you can design and implement an effective mentoring program. In this book you'll find tools, techniques and checklists that will enable you to develop a program that works. The challenges and obstacles to successful mentoring are also discussed.

The book covers these vital steps:



The final section of the book also contains re-usable templates worksheets and checklists.

About the Author



Ann Rolfe is the author of:

- *The Mentoring Conversation*
- *The Mentoring Guide*
- *The Mentoring Journal*
- *Take a Minute To Mentor*
- *How To Design and Run Your Own Mentoring Program*
- *Mentoring Demystified*
- *Mentoring Tips*
- *Mentoring Works Articles*

Ann Rolfe

Australia's most published author on mentoring, has over twenty-five years experience in learning and development. For the last fifteen years, Ann Rolfe has specialised in helping organisations and individuals enjoy the benefits of mentoring. Widely respected as a consultant and presenter, her training programs and resources are used internationally to develop and support mentoring.

Ann Rolfe is the founder of Mentoring Works where we help you create mentoring conversations, relationships and programs that work. We offer a comprehensive range of resources that provide clear, practical guidance based on extensive experience and expertise.

A Summary of Credentials

- Australia's most published author on the subject of mentoring
- Principal of the company operating since 1987
- Specialised in mentoring for over sixteen years
- Developed theoretical and practical mentoring models
- Produced structured guides for mentors and mentorees
- Worked with all levels of staff from CEOs, directors and front-line staff
- Facilitated pre-conference workshops in USA for the International Mentoring Association 2005, 2006, 2007 and 2010
- Presented to Senior Teachers in Singapore
- Worked on projects for different ethnic and cultural groups, including overseas trained doctors and dentists, Aboriginal and Torres Strait Islanders.
- Lectured for University of Technology Sydney in the Adult Education Faculty

Overview of Program Design

The following actions are necessary for successful program design. You will need to produce the outcomes listed below in order to design and run your own mentoring program.

1. Get clear about a definition of mentoring

- Produce a written description of the mentoring role and responsibilities.
- Select or develop a practical model of the mentoring process that will be applied.

2. Decide why you want a mentoring program

- Document program objectives and value to strategic organizational outcomes.
- Present the business case and obtain budget approval.

3. Design Your Program

- Document the plan with schedule, actions and accountabilities clearly defined

4. Develop Participant Training and Resources

- Deliver training to ensure that participants have clear roles and the knowledge and skills to fulfil them

5. Pilot The Program

- Select and train a group of mentors and mentorees participate in your program

6. Evaluate The Program

- Report the results, document learning and make any adjustments required for future programs

The steps are not discrete or necessarily sequential. Expect some overlap and concurrent activities as you plan your program but be sure to cover all steps. Each step is described in subsequent chapters.

Step One
Get clear about a definition of mentoring

What Is Mentoring?

Effective mentoring:

- Taps the knowledge and experience of senior people;
- Builds the personal skills of mentors and those mentored; and
- Retains talent, develops people and therefore impacts on the bottom line of an organization

Defining Mentoring

Before organisations implement a mentoring program and before individuals enter a mentoring relationship, they need to define what is meant by the word: 'mentor'

Different people have very different ideas about what mentoring is. Unrealistic expectations about what can be achieved through mentoring can undermine its effectiveness. Confusion regarding the role and responsibilities of mentoring partners can lead to disappointment and dissatisfaction.

Dictionaries tend to define a mentor as: "Wise guide". Many other definitions exist. However, mentoring is just a word, a label that is applied. You have to decide what it means in your program in your organization. You have to define the role, responsibilities and objectives of a mentor.

The word mentor originates from Greek mythology. The story is that King Odysseus was leaving to journey and fight a war from which he might not return. He entrusted his son's preparation as ruler to a wise counsellor, named Mentor, not knowing that Mentor was actually the goddess Athena in disguise.

Here is my definition. I've found that provides a useful framework for mentoring that is broad enough to allow individuals to negotiate a working agreement. Feel free to use it, find another more suitable or create your own.

*"Mentoring is an alliance of two people
that creates a space for dialogue
which results in reflection, action
and learning for both"*

What is The Difference Between Mentoring and Coaching?

The terms "mentor" and "coach" are often used interchangeably. Although most references agree there are differences between the two, descriptions of the roles are not uniform. So, since ideas about coaching generally derive from sporting models and mentoring is more often associated with careers, the following definitions may be useful:

Coach: a person who trains, tutors or prepares an individual for improved skill and performance

Mentor: one who guides and stimulates an individual's reflection and actions for improved personal and professional outcomes.

Mentoring and coaching both:

- Provide one-to-one interaction to achieve personalised learning and growth;
- Cater to individual needs, personal styles and time constraints;
- Can be conducted face to face or from remote locations;
- Complement formal training and educational experiences;
- Process real-life issues, problems and decisions;
- Facilitate access to information and choices about new behaviours and actions;
- Support the achievement of positive outcomes.

Coaching is used when there is a well-defined goal that is based on improving skills and performance.

Mentoring is appropriate for career planning, providing general guidance, setting and achieving goals, making decisions or facilitating problem solving.

The following distinctions provide understanding of the different roles:

Coaching	Mentoring
Supports achievement of specific goals	Enables self-development of broad capabilities
Action-oriented	Reflection-emphasis
Concentrates on "small steps"	Concerned with "the big picture"
Attends to a gap between actual and desired performance	Facilitates personal goal setting, action planning and implementation
Features practice of required performance, feedback and correction	Based on conversation, problem-solving, decision-making and critical thinking processes
Results can be measured objectively	Results may be subjective and difficult to measure
Behavioural outcomes evident within a prescribed time-frame	Insight, personal and professional growth evolves over an indefinite time

What Is The Mentor's Role?

The mentor's job is to listen, provide constructive feedback, help their partner consider various options, refer them to resources available and facilitate the mentee's decision making regarding work or career matters. The mentor may choose to share their own experiences and, if asked, give advice. The mentor may help their partner identify skills that could be developed, coach them and give them an opportunity to practice and receive feedback. They may act as a sounding board for their partner's problems, ideas or career plans, ask questions that cause them to explore issues, or challenge the mentee's thinking. It is these ways that mentors provide guidance but not direction to their partner. The mentor does not solve their partner's problems; rather they are a collaborator in a problem solving process.

What Is The Mentoree's Role?

The mentee can approach their mentor to discuss issues and ideas. The mentee may ask for feedback or advice or simply take the opportunity to express themselves - "get it off their chest". In speaking to their mentor, the mentee may find they gain greater clarity of a situation. The mentor's questions or comments may cause the mentee to see another perspective, consider other options and review their actions or plans. Whatever the matter discussed, it is the mentee who must make any decisions or take any actions required. The mentee is responsible for their own decisions and actions.

Mentor

- Guidance not direction
- Collaboration in the problem solving process
- Listen
- Question
- Feedback
- Options
- Advice
- Coach
- Sounding Board
- Challenge

Mentoree

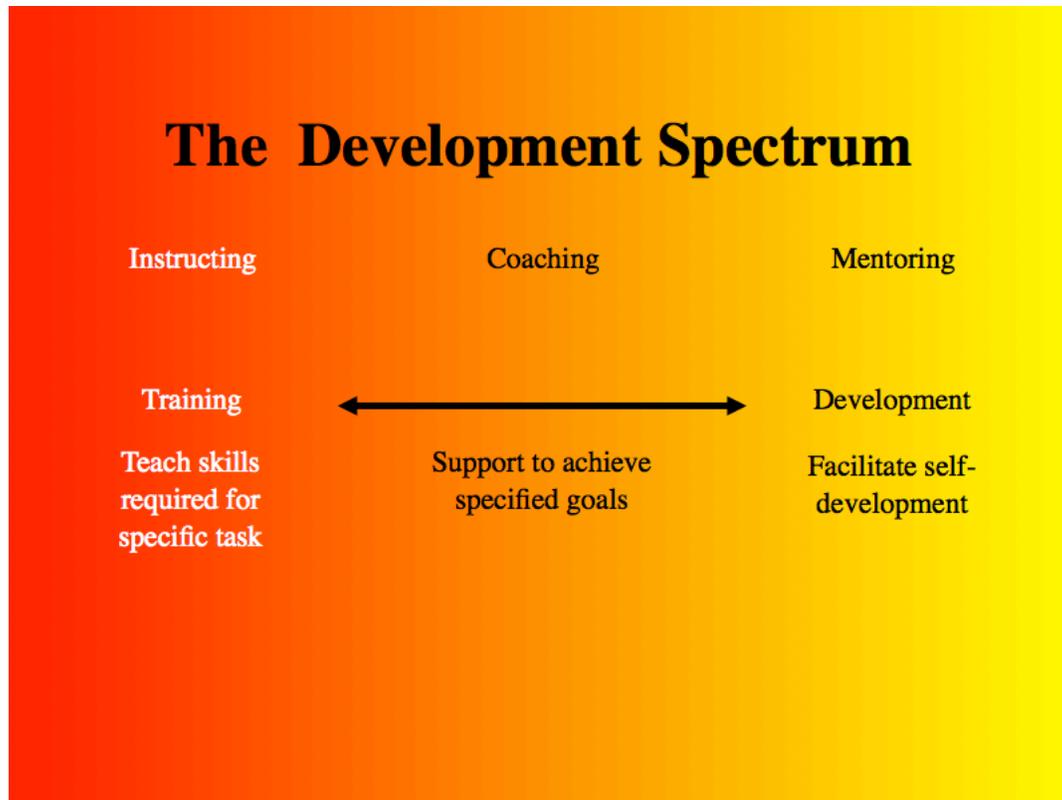
- Responsible for decisions and actions
- Reflection
- Clarity
- Perspective
- Options
- Decisions
- Action
- Plans
- Review

A Learning Strategy

Mentoring can also be described as a learning strategy, for it is the learning that occurs through mentoring that is its greatest benefit. The learning occurs because a need for knowledge, skills or the development of required attributes is identified; options are considered, thoughts and ideas are supported and challenged; and, a course of action is decided. The initiative, effort and self-confidence required to implement the decision, to take responsibility for one's actions and live with their consequences is supported. This enables a degree of mastery not learned from theory but by practice.

Mentoring may be a component of, or in some cases, an alternative to, formal education or training and development programs. It can be used for personal or professional development. It can provide a forum for discussion, exploration and testing of ideas and sharing of information, knowledge and expertise. It can lead to the development of a mutually satisfying relationship. Both mentor and mentoree learn, grow and benefit as a result of an effective mentoring relationship.

The aim of mentoring is to facilitate self-development, it is a vehicle for self-directed learning. The mentor is a resource and a support as the individual moves toward their own aspirations. The figure below contrasts the roles of instructor, coach and mentor.



Benefits For Individuals

- Discover and develop talents and skills;
- Discuss career aspirations and options;
- Give and receive feedback;
- Receive encouragement and support to achieve goals;
- Tap into informal communication channels;
- Learn the “unwritten rules”;
- Gain a new or different perspective;
- Hear about opportunities;
- Get help with ideas;
- Demonstrate strengths and explore potential;
- Gain visibility within, or outside of, an organisation;
- Obtain job leads;
- Be challenged, use talents and share expertise;
- Network and expand contacts;
- Give and receive support during a transition phase.

Advantages For Organisations

- Cost-effectively developing the talent, teamwork and leadership necessary to survive and prosper in the future;
- Developing creativity and innovation and/or selected skills;
- Creating a competitive advantage through effective management of a diverse workforce;
- Communicating values, goals and plans;
- Demonstrating personal and professional standards;
- Giving support, co-operation and motivation;
- Achieving excellent service;
- Implementing equity initiatives;
- Attracting and retaining quality staff;
- Changing organisational culture;
- Enhancing the leadership and coaching skills of managers;
- Re-enthusing plateaued staff;
- Increasing staff satisfaction;
- Enriching jobs;
- Linking theory and practice in formal education programs; and,
- Building a learning organisation.

Phases in A Mentoring Relationship

<p>Starting</p> 	<p>Relating</p> 	<p>Parting</p> 
<p>Initial contact</p> <p>Building rapport</p> <p>Defining the scope</p> <p>Clarifying roles</p> <p>Setting goals</p> <p>Negotiating agreement, contract and commitment</p>	<p>Developing the relationship</p> <p>Continuous process of goal setting, action planning, implementing and review</p> <p>Decision-making</p> <p>Problem-solving</p> <p>Development and growth of both parties</p>	<p>Evaluation of process</p> <p>Acknowledgement of contribution</p> <p>Closure and celebration</p> <p>Redefinition of the relationship</p>

Mentors and mentorees will need support during each phase of the relationship. An effective program includes strategies that will keep them engaged and motivated. This is covered in Step Three design Your Program.

The Mentoring Process

A mentoring conversation aimed at facilitating self-development is based on exploring four questions:

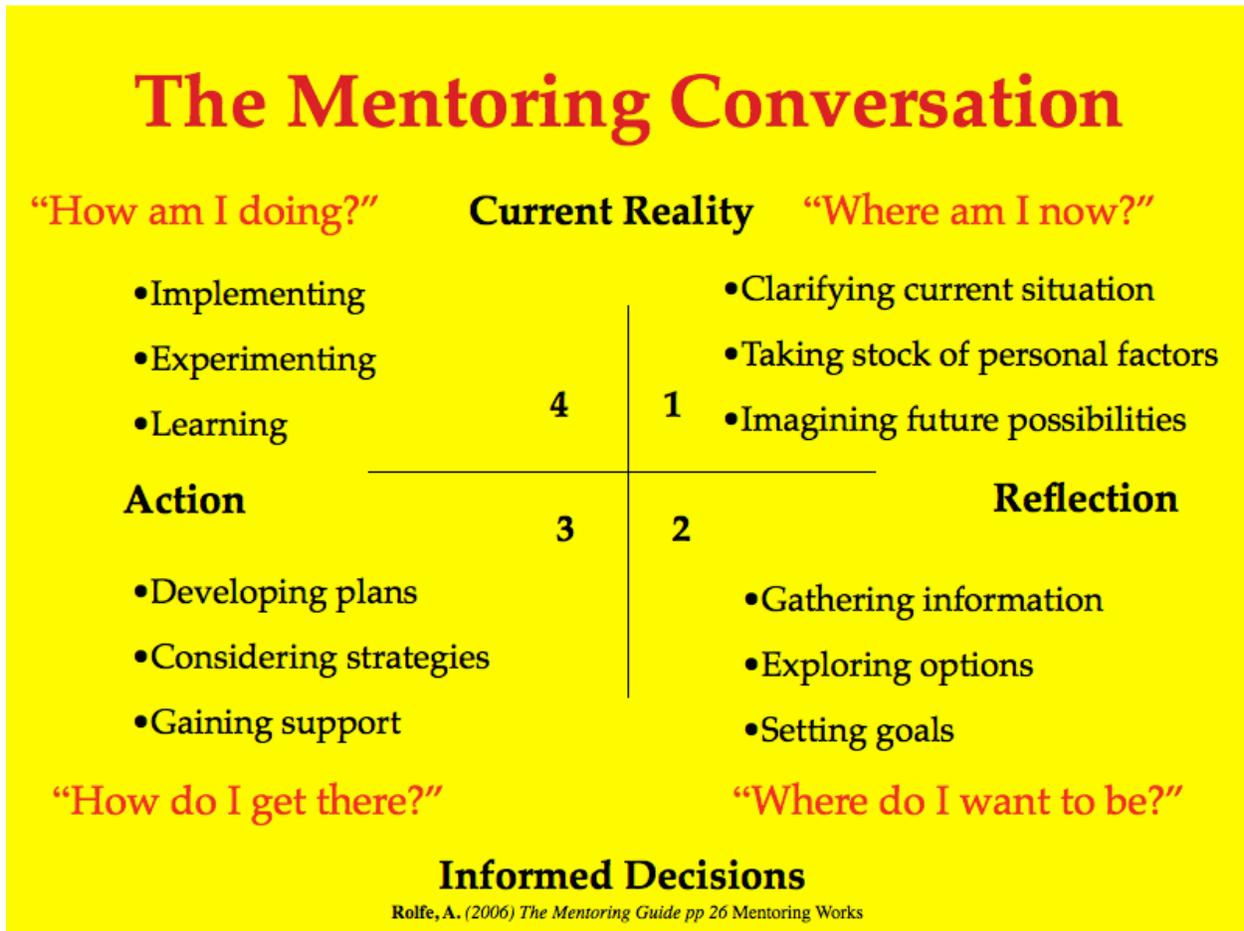
1. Where am I now?
2. Where do I want to be?
3. How do I get there? And
4. How am I doing?

The mentor firstly acts as a facilitator of the inward looking self-assessment, then the outward looking exploration of options. Next, the mentor assists the mentoree to make informed decisions, set goals and formulate practical strategies to achieve them. The mentor then encourages and supports the mentoree as they implement their plan.

The mentor is a collaborator in a problem solving process (problem is defined as: a goal to be achieved with a set of constraints). Once the "problem" is clearly defined, symptoms and causes clarified, creativity is combined with pragmatism as various strategies are generated and evaluated. Plans are developed and sources of support are identified.

The mentor enables the mentoree to progress from thinking to doing. The reflection, information gathering and decision-making cannot be allowed to stagnate into analysis-paralysis. There must be action. The mentor becomes a supporter as actions are implemented. It is an experimentation that results in new learning. Reviewing progress, the mentor is a sounding board for the final question: "how am I doing?"

The model below represents a mentoring conversation that combines all of the elements described above. It is a cycle of learning that may be applied in a one-off process to achieve a specific result or in a long-term ongoing relationship.



The Mentoring Conversation is a model based on learning theories such as those developed by David Kolb, Bernice McCarthy as well as classic problem solving and strategic planning and decision-making processes.

When a mentor models and leads the mentoring conversation as described, the mentoree learns by experience a valuable problem-solving and decision-making process that can be applied in any situation. Thus, a mentor assists not only with immediate needs but also equips the mentoree to deal with future issues.

Mentoring is an enabling process that demonstrates the wisdom of the saying: "Give a person a fish and you feed them for a day; teach a person how to fish and they can feed themselves for a lifetime". And they'll probably "feed" others too, since those who are mentored, tend to become mentors.

What Does a Mentor Do?

Participants in mentoring programs frequently describe a mentor as someone who:

- Listens
- Questions
- Offers another point of view
- Provides feedback
- Explores options
- Offers advice
- Gives information
- Is a sounding board
- Challenges and stretches the mentoree

The responsibilities of a mentor include:

1. Maintaining confidentiality of matters discussed
2. Being accessible and providing an appropriate amount of time
3. Listening actively to the mentoree
4. Encouraging the mentoree to see situations from more than one perspective and helping them to explore options
5. Promoting responsible decision making.
6. Motivating and supporting the mentoree in the achievement of their goals and referring them to various resources.
7. Ensuring a professional relationship, operating within your organisation's mentoring guidelines and policies.
8. Offering advice when asked without being directive and enabling the mentoree to use problem solving methods.
9. Acting as a role model, embodying the organisation's values and ethical standards.
10. Recognising when it is time to relinquish the role of mentor and doing so with good grace.

Conclusion

There are many different definitions of mentoring. You will find similarities and differences when you review the literature or talk to people. Mentoring is just a word and like any other in the dictionary, it means different things to different people. Some will want to argue about what mentoring is and isn't. However, what matters most is that *you* clearly define mentoring for your program. You can quote a well regarded source if need be, or make up your own, as long as it reflects what you want mentoring to achieve in your situation. It is also vitally important that mentors and mentorees understand their role and purpose.

Activities

1. Read the article: <http://www.odemagazine.com/article.php?aID=4228> Jay Walljasper *Saving The World One By One*. Ode Magazine Issue 30, January 2006.
2. Visit www.whomentoreyou.org
3. Speak with others who have mentoring programs about their definition.
4. Think about your own mentoring experiences. Even if it was not labelled "mentoring" at the time, you will have had a conversation or relationship with a person that prompted you to reflect, provided information, suggested strategies or supported actions.
5. Write your personal definition of mentoring (describe it in your own words).

And now,

6. Write a definition of mentoring for your mentoring program:

Mentoring is ...

Step Two
Decide why you want a program

Why Have A Mentoring Program?

Strategic Value

Your program must be linked to corporate objectives and integrated with key strategies. The program has to *matter* to all the stakeholders. Objectives in hard-nosed dollar terms, statistics and other quantifiable measures are necessary. Warm fuzzy, human resources initiative are simply not good enough. You have to spell out the return on investment.

However, realise that mentoring is not a magic bullet that will fix everything. Gather facts and figures from within your organization and industry. Collect available statistics for before and after measures of important organisational results. Then, realistically assess the likelihood of mentoring making a significant impact.

Mentoring, when well designed, properly implemented and adequately resourced can:

- Attract and retain talented employees;
- Develop people – those who mentor as well as those mentored;
- Facilitate career planning and progression;
- Reduce "silo mentality" and increase cross-organisational communication; and
- Increase the return on your investment in learning and development and reduce turnover costs.

Mentoring Retains Talent

The workforce of today has changed. Most people do not expect to stay in jobs for longer than 2-5 years. There is strong competition for talent and in many areas, skills shortages. Young people entering work are the most educated in history. They are highly mobile. The average school leaver will have twenty-nine jobs and five career changes in their work-life. Employers have succeeded in their demands for a "flexible workers" but flexibility works both ways, employees want work to suit their lifestyle. Pay and benefits are not sufficient to keep good people.

There are alarming statistics on employee engagement. Gallup (see <http://gmj.gallup.com/>) reports on world-wide research showing that less than 20% of employees are actively engaged. This means that they are highly productive, adding to profitability and customer satisfaction and likely to stay. However, close to 20% of employees are disengaged. They are detracting from performance. It is likely that the remaining 60% are not committed to the organization and will leave if something more attractive is available. A third of employees are actively looking for employment elsewhere and the growing popularity of websites catering to job-seekers makes it easy.

Therefore, attracting and retaining talent is a key issue for most organizations. Most invest in effective recruitment. Return on this investment is not guaranteed as even the brightest new hire takes some time to become fully productive. When employees depart within two or three years, their development is an expense that leaves the organization in deficit. Investing in keeping people who wanted to work for you to start with makes sense. The Center for Creative Leadership tells us that 77% of companies report mentoring to be an effective retention strategy.

People don't leave jobs, they leave environments that don't support them or provide opportunities for achievement. They leave because no one seems to care about them personally or encourage their development. Mentoring establishes relationships that connect people personally and encourage professional development.

Mentoring Develops People

As well as being a source of knowledge and skills transfer, mentors guide decisions about workplace issues, personal goals and ongoing professional development. They are a professional friend, a colleague to share the rough times and the good and a sounding board for ideas.

Those who are mentored enhance communication skills, assertiveness, decision-making, problem solving and planning. They can gain more control over their career and take responsibility for their own professional development.

It's not just the mentoree who benefits from mentoring. Mentors get a real sense of satisfaction from their contribution. They also build skills. Interacting with someone who is not a subordinate, taking a collaborative rather than directive role in decision-making or problem solving, and taking time out to really listen, can allow managers to evolve a whole new level of interpersonal skill. They may increase their understanding of other groups, reducing cultural, gender and generational issues.

The Mentoring Conversation is a process that utilises reflective and active modes of learning as well as facilitative and assertive communication. Both parties gain insight and can produce tangible outcomes from their relationship. A well-designed mentoring program sets up methods for measuring these results.

Mentoring For Career Development

A survey of 6000 Australian organizations, identified lack of career development as a primary influence on staff turnover. Loyalty to organizations has been wiped out by three decades of downsizing and restructuring. Bright people are savvy about managing their own careers and don't stick around where they perceive no interest, opportunity or support for progress. They're not just looking for money or promotion – though these are important. Some are looking for excitement and challenge. Others want status and perks. Many are looking for balance and life style. However, most want personal and professional growth.

A mentor can point out hidden opportunities. They can show the pathways, support the plan and, when needed, provide a reality check. They can also enable connections that build networks, access information and stimulate sound decisions.

Mentoring Breaks Down Barriers

Large organizations are compartmentalised. This reduces cross-organisational communication. A "silo mentality" means that, often: "the right hand doesn't know what the left is doing". Furthermore, a sense of isolation, or of being just a cog in the wheel can overwhelm a new employee. Mentoring can help people see the bigger picture. Especially, when mentors and those mentored work in different parts of the organization. Mentors have often moved around and have established networks. They have a broader perspective of the organization. Knowing what other parts of the organization do, is often cited as beneficial by mentorees.

Increasing Return on Investment on Learning and Development

The American Society for Training and Development has reported that managerial productivity increased by 88% when mentoring was involved compared to only 24% with training alone.

What sort of return on investment does your organization demand for its development dollar? Seems it will get more than 60% better results by incorporating mentoring.

Mentors can work with people before, during and after learning events to ensure that they are receptive to, and see the relevance of, the development opportunity. Discussion and questioning can improve retention of information and insight. Finally, and most importantly, mentoring can increase the likelihood of transfer of learning into work practices.

Specify Objectives

Once you have identified why you want a mentoring program from a strategic viewpoint you can distil these reasons into specific and measurable goals for the mentoring program. Consider the people who will be mentored, what you hope they will achieve as a result of mentoring and the tangible results you could measure. Remember that there are many ways to achieve the strategic objective. Below are a few examples. A reproducible pro forma is contained in the Worksheets section of this book.

Strategic Objectives (organisational need)	Program Purpose (broad aims, focus)	Realistic Objectives (measurable outcomes)
Reduce staff turnover	Support new employees	% increase in retention
Reduce staff turnover	Career progression of targeted group	Number of internal applications for higher grade positions
Reduce staff turnover	Professional development	Number of staff completing designated course

Conclusion

Organizations focus on different things at different times. Is your organization's biggest concern:

- Recruitment?
- Retention?
- People Development?
- Knowledge Management?
- Succession Planning?
- Organisational Development?

You must pitch your program so that you can clearly demonstrate its value to strategic organisational outcomes. Listen to the language your organization speaks when describing goals and challenges. Look at its vision and get a feeling for the current situation. Your mentoring program must link to future aspirations or deal with current pain.

Activities

1. Visit <http://www.mentoring-association.org/>
2. Visit <http://gmj.gallup.com/>) and review reports on employee engagement
3. Speak to others who run mentoring programs about their objectives and outcomes.
4. Read your organisation's Annual Report, Strategic Plan, Business Plan or any documented vision, direction or values statement.
5. Identify, in broad terms, an area where the development needs of the organization and the employees coincide. In other words, the way in which mentoring could make a difference. You will make this much more specific and measurable in Step Three, design your program.

And now,

6. Write why you want a mentoring program:

The reason I want a mentoring program is ...

Step Three
Design the program

Design Your Program

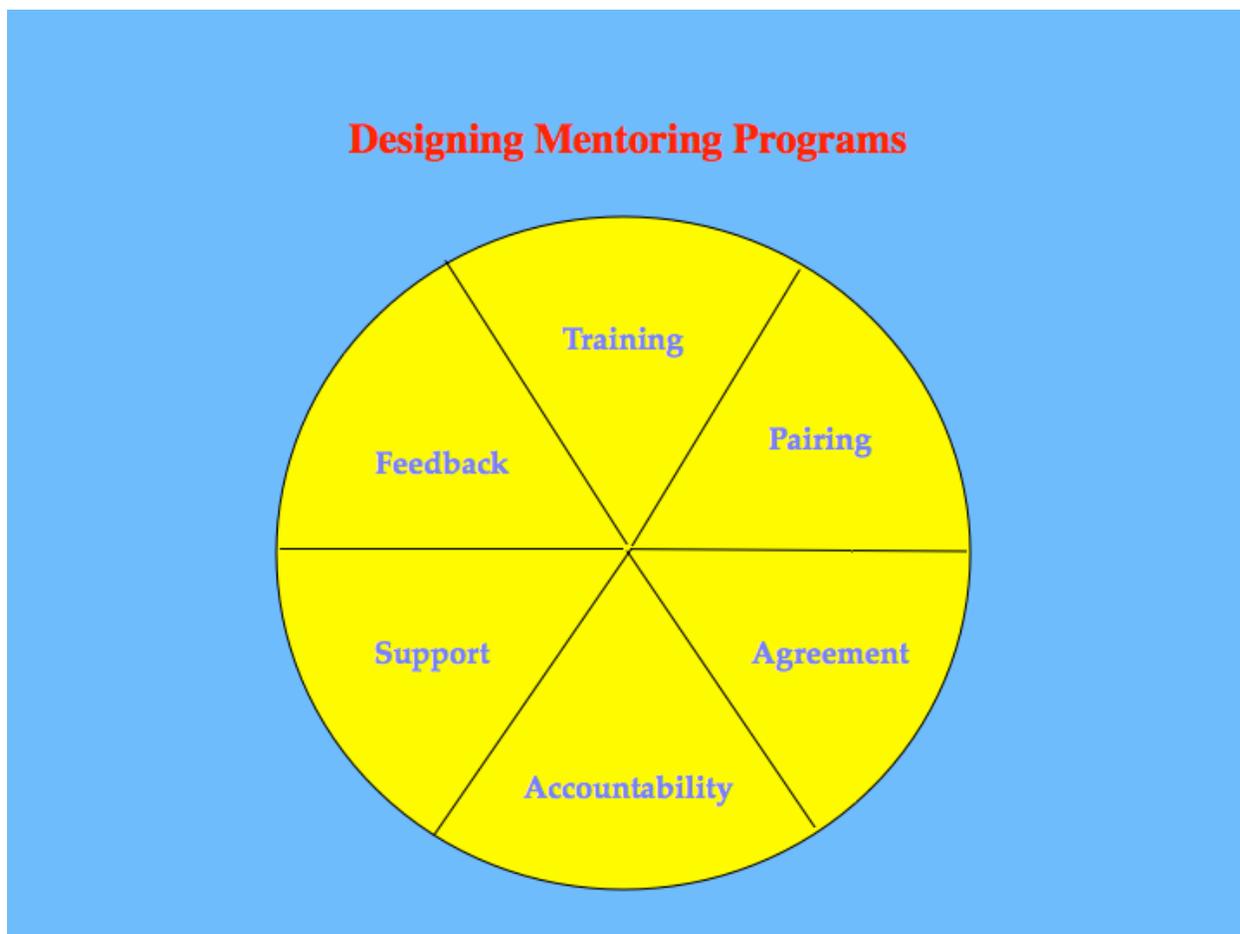
Engage Stakeholders

It is useful to bring together a group of key people to help plan your program. An inclusive process not only gathers valuable input but also minimises the possibility of obstruction. While the belief that "you cannot succeed without support from the top" may be true, mentoring can be derailed by a lack of cooperation at other levels – including the very people you want to support.

Ideally, a facilitated workshop, bringing together a cross section of interested parties, including the CEO, business unit and line managers, human resources staff and some of the target group of mentors and mentorees enables the group to:

- Determine realistic objectives for a mentoring program;
- Identify components of a mentoring program;
- Discuss mentor matching process for their organisation;
- Develop a communication plan;
- Consider evaluation techniques;
- Draft a timeline for a mentoring program; and
- Determine who will take responsibility and action each aspect of the program.

The diagram below identifies key areas that you need to address in designing your mentoring program.



Training

Both mentors and mentorees need to be trained. Even experienced mentors need an orientation to the objectives of a particular program and it is useful for them to meet and become part of the network of mentors and mentorees. They also need the opportunity to raise issues and concerns and have their questions answered. It is particularly important for mentors to understand the strategic value of the program and that their contribution benefits the individual but also contributes to building the capability of the organization.

Some suggested content for training is included in Step Four: *Develop Participant Training*.

Pairing

Your aim is to form mentoring partnerships that have the greatest chance of being effective. For mentoring to work, both participants need:

Desire – a genuine wish to be involved in mentoring

Good will – entering the relationship with good intentions

Rapport – the ability to relate to one another

Communication skills – attending, listening, questioning, feedback and appropriate self-disclosure

Time – the ability to agree, commit and schedule reasonable availability

This is more easily achieved if you call for **volunteers** in your program and use **selection criteria** to choose the people who have the most likelihood of success.

You need to design a **recruitment process** for mentors and mentorees that is not unlike hiring for any other job. You need a job description and person specification. You'll have to advertise, handle enquiries, obtain written applications and perhaps interview.

Matching Criteria

To match the needs of the mentoree with an appropriate mentor, consider:

- The specific experience or expertise of the mentor – they do not have to be from the same field!
- The mentor's position – they should not be in a direct line of authority. Someone outside of the immediate work area is an advantage;
- Accessibility – are they nearby or at a remote location?
- Ability – are they capable of taking on the mentoring role?
- Are they a role model of appropriate values?
- Do they have a broad knowledge of the organization?

Qualities For Effective Mentoring

Participants surveyed over the last ten years nominate the following characteristics:

Mentors	Mentorees
<p>The ability to:</p> <ul style="list-style-type: none">• Actively listen• Be a sounding board• Ask challenging questions• Provide constructive feedback• Be accessible and approachable• Discuss options• Refer to resources• Collaborate in problem solving• Facilitate decision making• Share experience• Give advice	<p>The ability to:</p> <ul style="list-style-type: none">• Take the initiative• Ask questions• Discuss ideas and issues• Listen• Consider new ideas• Set goals• Plan actions• Follow through• Use resources• Take responsibility

Aim to recruit more mentors than you need. By having a pool of mentors, you have the resources to change pairings if a relationship is not working out or someone leaves. However, you will have to manage the reaction of mentors who are not immediately matched. Also plan a method to ensure that at every stage, mentors are acknowledged for their willingness to contribute.

Make sure that those who wish to be mentored understand that they are not in for a free ride or special treatment. Mentorees advance by their own efforts not favouritism. Their advantage is that they invest time in thinking and discussing their aspirations with someone who has experience and expertise. The mentor will question them, challenge them and offer suggestions. It is up to the mentoree to make decisions and act on them.

So consider your candidates carefully. For a pilot program especially, you want people who will use the valuable experience of mentoring productively.

Although you want people to volunteer, you may have to actively seek participants. Many great mentors are modest folk who don't realise how valuable their contribution could be. You'll need to ask them directly, not wait for will not put their hand up. Likewise, people who could benefit from mentoring may not be assertive enough to push themselves forward. Go looking for them. Ask managers to nominate people with potential. Make sure that you promote mentoring as a development strategy not a remedy for deficiency. Mentoring is about nurturing talent not fixing performance problems.

Participants like to have some input to and/or feel that there is some rationale for the match. Most programs obtain information from the mentor and the mentoree so that the co-ordinator can match the desires of the mentoree with the skills and experience of the mentor. Develop an application form – usually called an Expression of Interest - that gathers information from mentors and mentorees that you can use for matching (see example below). Often, mentorees are asked to nominate several people that they'd like as mentors. The co-ordinator then approaches these people to see if they are willing.

**Expression of Interest
XYZ Mentoring Program**

I am interested in (please tick): having a mentor being a mentor (may use separate forms for mentor/mentoree and colour code)

Name

Job Title

Length of service with this organisation

Address for correspondence

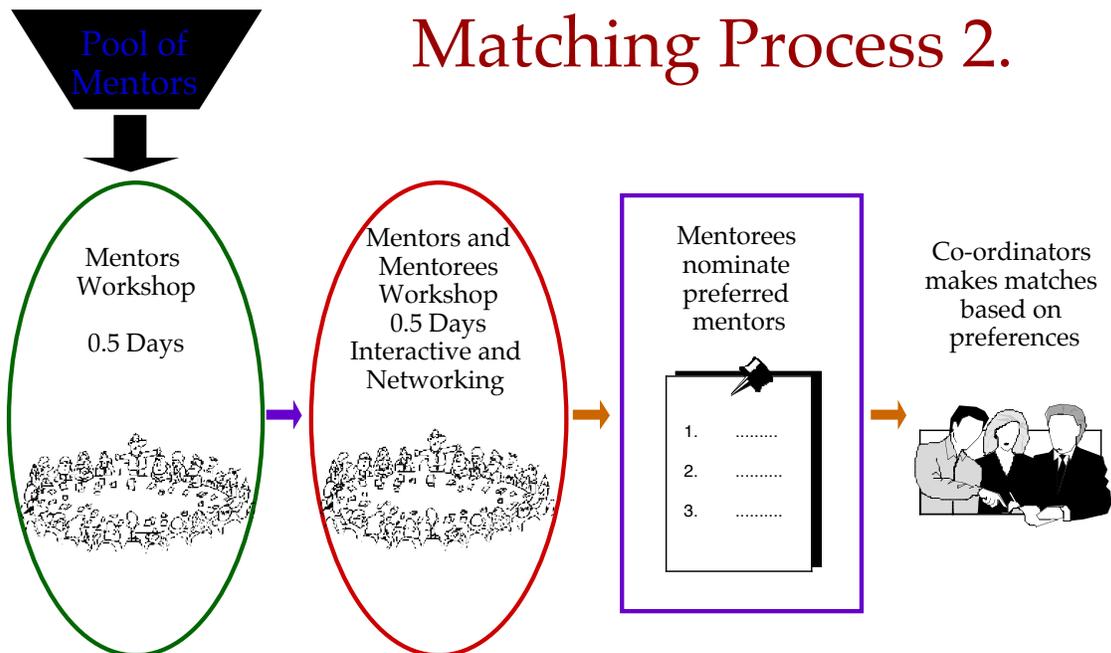
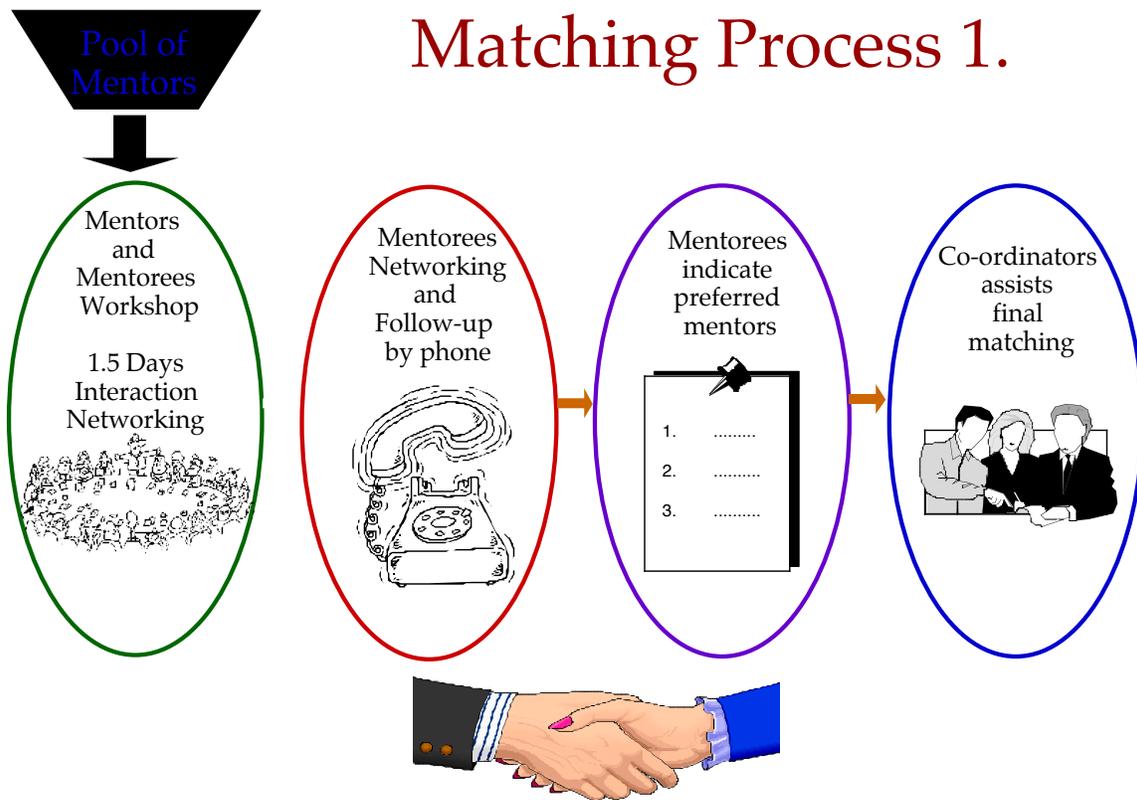
Phone, business hours, after hours, mobile, Fax ,email

1. **Overall, what do you want to achieve by participating in the Mentoring Program?**

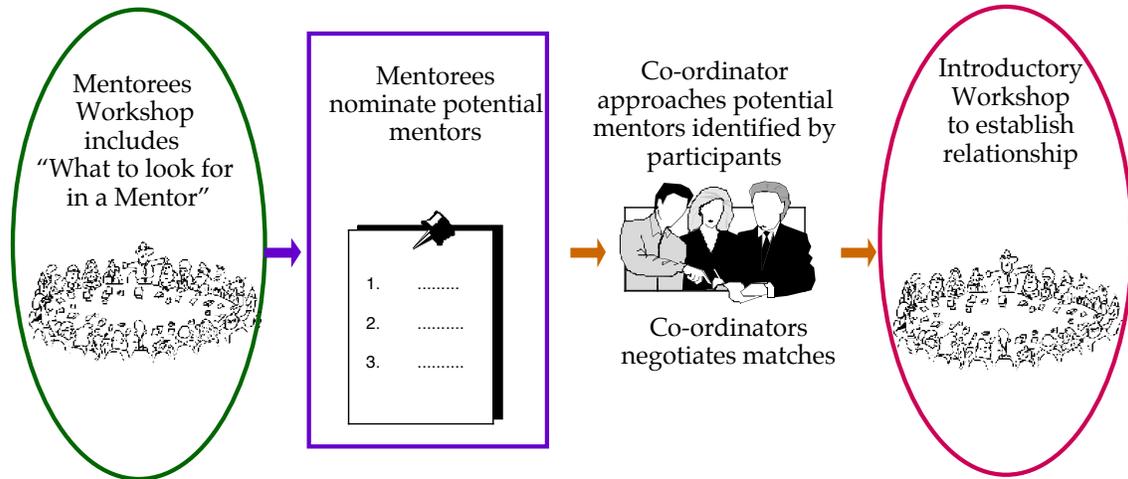
2. **What professional development have you previously initiated** (Please list TAFE/tertiary courses, short courses, qualifications/accreditations etc., that you are currently undertaking or have completed):

3. **For people seeking a mentor:** Do you know who you would most like as a mentor? If so, please list below three people, in order of preference. If you do not know who you would like as a mentor, describe the type of mentoring or characteristics of a person who might meet your needs.
 - 1.
 - 2.
 - 3.Alternatively, tick this box to indicate that you wish to discuss your mentoring needs .
4. **What information about you would help in matching you with an appropriate mentoring partner?**
5. **Do you have your supervisor's agreement to your participation in the program?**
6. **Please indicate: I am/am not available to participate in the Mentoring Workshops on (dates).**

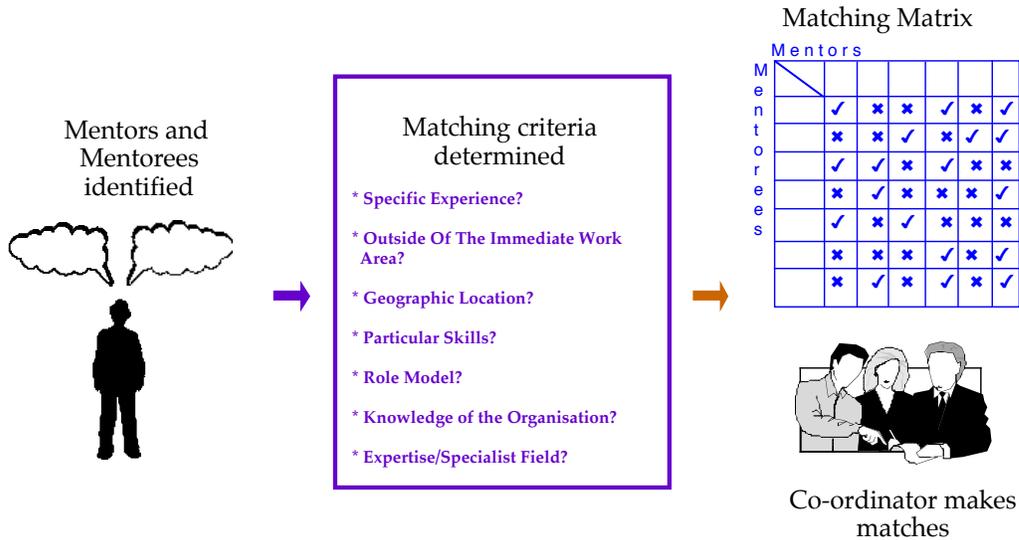
The diagrams below outline several approaches to matching mentoring pairs.



Matching Process 3.



Matching Process 4.



Some organisations build the matching process into the paired training. Mentorees and potential mentors (in equal numbers) are gathered for a two-day workshop. The process provides every mentoree with the opportunity to meet and work with all of the mentors in a range of activities. The mentoree then ranks, in order of preference the mentors they'd like to work with. The co-ordinator then makes the matches, giving each mentoree the highest ranking choice wherever possible. Obviously, this process is challenging to manage, however, it has been used successfully for several years in at least one organisation.

In some programs, participants take the Myers-Brigg Type Indicator (MBTI) and explore the implication of personality type. MBTI is used, not as an aid to matching but as a tool for understanding differences, strengths, challenges and enhancing communication. The point is, the people we can learn most from are those who are different from us. It is easy to build rapport with people who are like us and we are challenged by personality differences. However, the maturity and skill it takes to develop a relationship with someone unlike ourselves serves us well at work and in life.

When attempting to match people appropriately, remember, if people have the basic skills, the will and time, they can make mentoring work.

The First Contact

It is an advantage if you can orchestrate the first mentor-mentoree interaction during a group activity. Workshops typically incorporate ice-breakers. Informal conversation takes place in coffee breaks and over lunch. Face-to-face contact is the best way to initiate a mentoring relationship and if the participants have not met before, a facilitated process where other group-members are doing the same thing eases any discomfort associated with meeting a stranger. Allowing pairs some time together with an assigned task helps them get started. A group debrief can reinforce your guidelines for an effective mentoring meeting.

Agreement

A workshop can provide the setting for the group to discuss expectations. Put mentors into one group and mentorees into another to list and feedback their expectations. This non-threatening start enables the pairs to use the items generated by the group to negotiate their own agreements.

Likewise, the pairs need to discuss and agree the roles each is to take. You provide a framework, some parameters and policy within which they are expected to operate. However, the participants themselves need to articulate more specific agreements. Some of the issues to be discussed are explored below.

- What are our goals for mentoring?
- What roles do we take, what are our expectations of one-another, what are our responsibilities?
- How long do we envisage the mentoring relationship lasting?
- How often shall we meet?
- How much time are we willing to invest in mentoring?
- What if it doesn't work?
- Do we need a written agreement?

Is A Written Agreement Necessary?

Some people like a written agreement to structure their efforts; others hate the idea of a written "contract" fearing that formalising mentoring will constrict the process and make it uncomfortable and unnatural.

In most mentoring programs agreement templates or checklists are provided and mentoring partners discuss and decide for themselves whether or not to use them. A workshop to help mentoring partners establish their relationships should include discussion of this issue. An important consideration is: if participants choose not to have a written agreement, how will they ensure that the mentoring relationship meets expectations and achieves desired outcomes?

It is often helpful to have *something* in writing that both partners have developed. Having the agreed goals, expectations and ground-rules written down helps people stay on track. A written agreement does not mean mentoring partners cannot change any aspects that do not seem to work. The agreement can be amended by mutual consent anytime.

Sample Agreements



Agreement Between: Jane Smith and Bill Jones

Purpose: To support Bill's career development

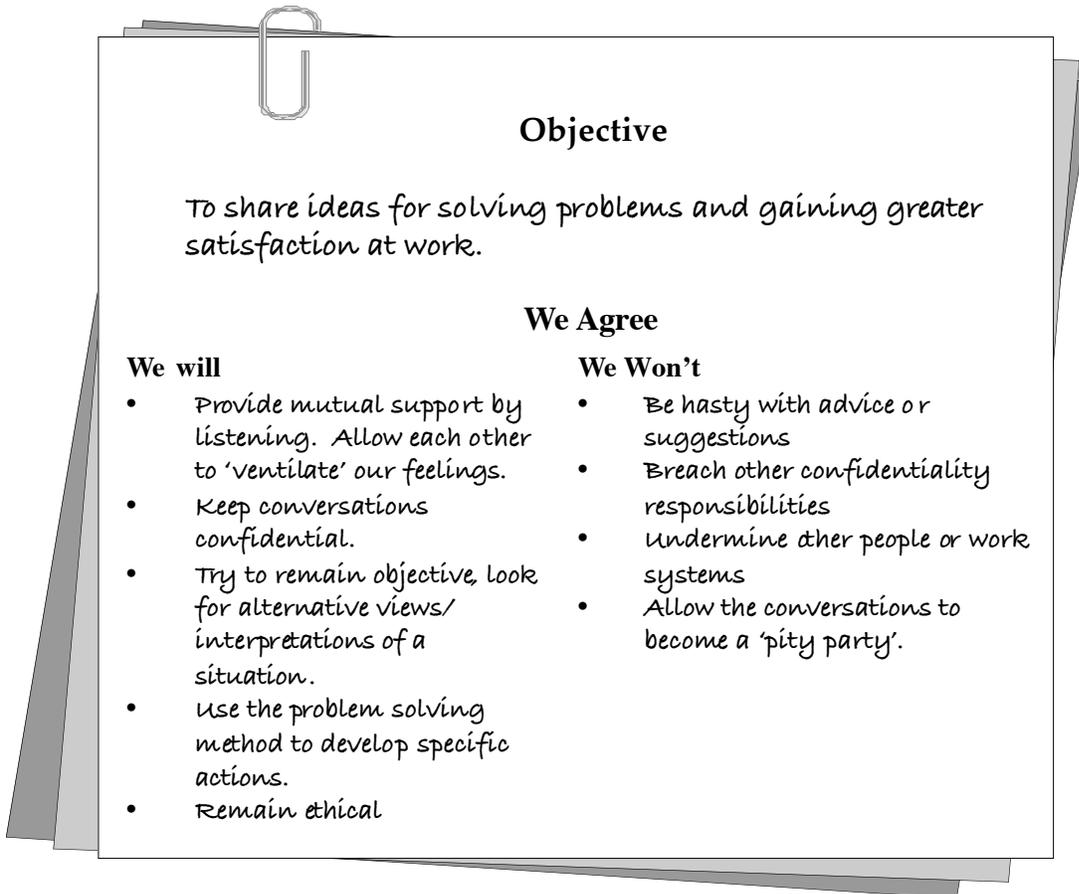
Activities

- Discuss career to date, identify skills, preferences and interests
- Explore opportunities within the organisation
- Identify possible future positions
- Compare current skills with those required
- Produce a development plan
- Implement and review
- Others as agreed

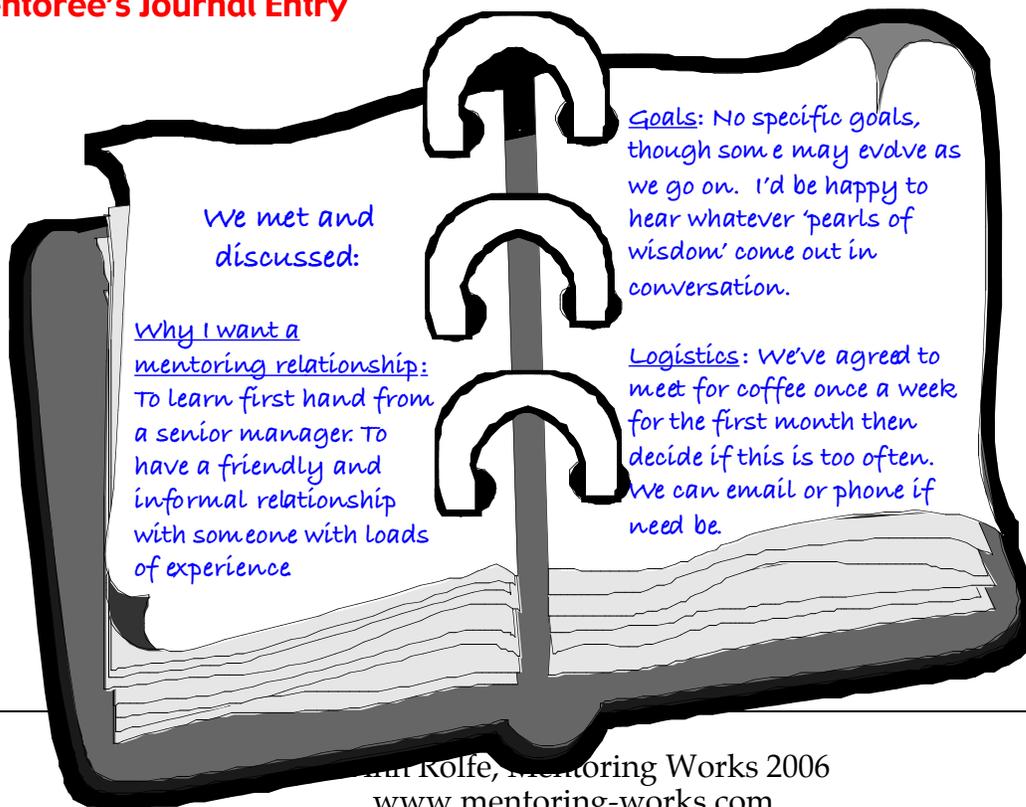
Communication Methods and Frequency: email any time, phone every 2nd Wednesday afternoon – agenda or questions/discussion points emailed by COB Tuesday. Get together for lunch when we're able – aim once per month – no agenda, can just be social or can talk about career if we want/need to.

Review: Give informal feedback at each contact. Use the 'scorecard' we developed in the workshop after 2 months

Problems/Help: Be honest and tactful, let each other know immediately if we are having difficulty. Request ..



Mentoree's Journal Entry



Logistics and Scheduling

Creating time is the number one challenge in mentoring. It is easy to be overambitious. On the other hand, people looking at busy schedules may feel as though squeezing in another commitment is almost impossible. A realistic approach with an agreement to re-evaluate the amount of time after a trial period is sensible. After an initial face-to-face meeting, over-the-phone contact may be a viable alternative to meetings, working breakfasts or lunches may suit some people and email can be used to stay in touch. Most mentoring partners aim to talk at least once, possibly twice, monthly with greater frequency in times of need. As well as the interaction with the mentor, it is likely that the mentee will need to schedule some time to work alone on tasks connected to the goals of the partnership.

Advise pairs to schedule regular meetings and diarise them. Instruct them never to cancel a meeting but to reschedule it if the situation demands it. It helps if they set a regular time and day of the week for their ongoing contact.

Accountability

The mentoree takes responsibility for driving the relationship. They confirm appointments ahead of the designated time and set an agenda or identify discussion points. The mentor is a resource, to respond to their needs. In this way, the mentoree is empowered by the process and less likely to become dependant. However mentors should call their mentoree if they haven't heard from them within the agree time. The mentor makes themselves available for an agreed amount of uninterrupted time. Issues of accountability are most easily dealt with by asking the pair negotiate an agreement from the outset.

A program co-ordinator is usually appointed to implement, manage and evaluate a mentoring program. Internal administrative tasks need to be delegated to appropriate support staff or done by the co-ordinator. External facilitators or in-house trainers may deliver parts of the program but someone within the organisation must have overall accountability.

The co-ordinator has responsibilities to the participants in the mentoring program and to management. The checklist below is an overview the main tasks of internal co-ordinators.

Co-ordinators Checklist

- Prepare an information package including mentoring guidelines
- Publicise the program within the organization
- Distribute information
- Schedule training and other functions
- Book and prepare venues, materials, refreshments etc.
- Book and brief speakers and presenters
- Publish calendar of events
- Obtain or prepare participant resource material
- Recruit and select mentors and mentorees
- Match mentoring pairs
- Provide support to mentors and mentorees
- Communicate with managers and staff not involved in the program
- Organise group meetings and review process
- Get people to attend events
- Arrange payments for costs incurred
- Maintain records
- Arrange acknowledgement of mentors
- Follow-up all participants at prescribed intervals, monitor progress
- Collect evaluation data
- Report Results
- Prepare proposal for next program, using the learning from this one to make adjustments.

For a pilot program, it is useful for in-house co-ordinators to keep track of time used (it's always more than you think) so that this time can be accurately costed for future program budgets.

Support

Ongoing support for the program and the people is vital. A mentoring program left alone is likely to wither and die. Strategies that maintain the enthusiasm from the launch of the program to its close will improve the probability of achieving the specified outcomes.

Activities you may wish to include:

- Networking events
- Workshops on topics such as career planning, assertive communication, leadership
- Projects or assignments
- Mentor forums
- Social events
- Presentations by in-house subject matter experts or people with success stories
- Workplace tours
- Shadowing
- Journaling
- Mid-point review group activity
- Finalé – celebration , recognition and program close

Resources you can provide:

- Regular newsletter, articles or tips
- Assessment instruments
- Library
- On-line courses
- Intranet website
- Noticeboard
- Email group or blog
- Teleconferencing

Mentor The Mentors

It is ironic that in some mentoring programs, mentors are provided with some training at the beginning, then left alone without support. The most experienced mentors still welcome a forum in which they can talk and learn from each other and draw on additional expertise. Mentors need to feel valued for the contribution they make. Issues and problems may arise and guidance may be needed. So stay in touch and nurture your mentors. Best of all, provide them with mentoring. Support needs to be regular, relevant and enjoyable. It may be necessary to budget for ongoing external support to ensure that mentors are mentored if the coordinator is unable to fulfil this role.

Feedback

Your program may require, or at least recommend, that pairs review their progress and give feedback to one another.

As co-ordinator, check in with both mentors and mentorees to see how things are going. Even if the pairs do not need your assistance, they need to know you care. Monitoring and evaluation should be part of every mentoring program. Informal contact, perhaps by phone can be supplemented by more formal surveys and data collection.

It is likely that you will be required to report the results of the program to management (more on evaluation in Step Six). Even if it is not required, you would be wise to provide plenty of information about the success of your program. You want ongoing support and funding so you need to publicise positive results to decision-makers.

Group reviews mid-way and at the end of the program are useful. A mid-point review provides a chance to check on progress, identify any issues and address them. It allows participants to discuss achievements and problems and ways to get the most out of the remainder of the program. Typically, participants report renewed enthusiasm and increased confidence as a result of the mid-point review.

To conclude the program, a final session celebrates the achievements, acknowledges the contributions of participants, and gathers feedback and suggestions for improvement for future programs.

The Finalé also provides a point of closure for participants (although they may decide to continue informal mentoring relationships). The review process can be followed by an informal social event (drinks/lunch).

Timelines

When setting up a mentoring program for the first time, it can be difficult to know how much is involved and how long it will take. Below is the output of a workshop to develop realistic timelines for the implementation of mentoring programs. Three participants were in the early stages of planning pilot mentoring programs for their organisations and were able to get input from others with previous experience. The whole group first brainstormed a list of "key events" that need to occur in the planning and implementation of a mentoring program. These are listed (not in sequential order) below. Participants then formed separate groups to discuss timelines for each of the three planned programs (also shown below).

Key Events of a Mentoring Program

- Define objectives
- Identify target group
- Gauge interest
- Gain support from senior management
- Obtain financial commitment
- Establish budget
- Select participants
- Plan the process – training events, meetings and support networks
- Marketing / communication
- Develop a time line
- Establish evaluation methods
- Establish committee / group – to make decisions
- Define monitoring process
- Establish conflict resolution process
- Determine alternate plans ie. what if mentor or mentoree leaves organization?
- Establish reporting methods – determine who needs to receive information and how the information will be presented.
- Establish who is responsible for the overall program, for continuity and so that it can be properly resourced.
- Clarify everyone's expectations
- Provide support for those employees not selected to be part of the program
- Create guidelines / policy document
- Establish a strategic link for endorsements
- Establish way to recognise the valuable contribution of the mentors in the program.

Example: Timeline 1

Working on a program that needed to be running by June 30, due to business constraints later in the year, one group decided to work backwards from June 30 and produced the following:

Now (November)	<ul style="list-style-type: none">• Establish and agree on objectives• Confirm budget• Establish how the program will work• Obtain sign off by Executive committee• Establish a working committee
January 31	<ul style="list-style-type: none">• Promotion of the program• Selection of Mentors and Mentorees
March 31	<ul style="list-style-type: none">• Implementation• Training Courses
April 30	<ul style="list-style-type: none">• Launch – with first workshop before the end of May
May 31	<ul style="list-style-type: none">• If the program hasn't started now it's too late.
June 30	

Timeline 2

This mentoring program had an approved project proposal with objectives and budgets. The project consisted of a six-month mentoring program with approximately five mentoring pairs. This group identified tasks and applied approximate time frames against each task

Task	Timing
Establish a coordinating committee	2 weeks
Coordinating committee meetings to formulate program guidelines: <ul style="list-style-type: none"> • Define target group • Selection process: mentors and mentorees, reporting and project plan • Training • Monitoring • Evaluation • Risk management • Policy document • Expressions of interest form and information kit 	4 weeks 2 meetings
Communication/Marketing <ul style="list-style-type: none"> • Announce and call for expressions of interest • Attend meetings to promote 	4 weeks
Selection of Participants <ul style="list-style-type: none"> • Correspondence • Match pairs 	1 week – this would be a period of time devoted to focussing on these tasks
Conduct workshop	1 day
Monitoring <ul style="list-style-type: none"> • Contact participants • Mid way meeting 	2 hours per month for 6 months
Evaluation <ul style="list-style-type: none"> • Focus group meetings • Questionnaire • Analyse results • Report to executive 	4 weeks

Timeline 3

This mentoring program was for Distance Education students. The deadline for preparation for the program was March of the following year when the new students enrol. The mentoring program was designed to prevent students dropping out and it has been established that most dropouts occur at the end of semester one. Therefore, the information and processes needed to be in place to send out with enrolment forms so that the program could begin when first semester commenced.

1. Present proposal to colleagues at a staff meeting to facilitate discussion and determine level of interest and who else is interested.
2. Consult with other Universities regarding distance education mentoring programs. What worked and what didn't work? How would you do it differently?
3. Refine time line to take in feedback from first 2 steps and fine tune objectives
4. Contact and recruit mentors and advise of program plan and commitment – what is being asked of them.
5. Ask past students what would have helped them, what they found difficult.
6. Develop a flyer for marketing/communicating
7. Develop selection criteria for mentors – select mentors and match with mentorees
8. Develop training material/hand outs (manual)
9. Formalising the agreement and contact
10. Monitoring partnerships every month for 6 month period
11. Evaluate the program – looking at reactions and results ie. mentors, mentorees and department.

The timelines for the three mentoring programs show that the most ambitious (shortest) plan involved eleven weeks of consistent activity from formation of the planning group to launch. Each of these programs had already been the subject of considerable forethought and each of the coordinators, who participated in workshopping the timeline, was surprised at the lead-time required. Without planned a timeline, the number of tasks in the available time can overwhelm coordinators.

A Communication Plan

You will need to let people know about your mentoring program and continue to keep them informed over the life of the program. You need to communicate with:

- The target group you plan to mentor – so they get involved
- Potential mentors – so they can make informed decisions about participating
- Senior management – you need their commitment
- Line managers – if they are not supportive your program can be derailed
- People who are not directly involved – if they don't feel OK about your program they can be obstructive.

In other words you need to publicise your program, some would say market it, throughout the entire organisation. You want people to feel positive about the program and understand that it benefits the individuals involved and is valuable to the organization.

The diagram below shows some of the methods of communication that have been useful in mentoring programs.



Conclusion

All of the areas covered in this section need to be addressed in a documented project plan. It is a lot of work that takes some time. You will need input from others and perhaps assistance from within the organisation or an external consultant.

Activities

1. Review the Design Checklist and the Program Co-ordinators Checklist in the last section of this book.
2. Decide if you have sufficient in-house resources or need an external consultant.
3. Talk to stakeholders. Run a planning workshop.
4. Draft a timeline for all activities. Ensure your lead-time is realistic.

And now,

6. Document your mentoring program project plan.

Step Four
Develop participant training

Develop Participant Training

The purpose of training is **to enable mentors and mentorees to establish effective relationships**. Some programs simply introduce people and leave them to "get on with it". Occasionally, this works. But most people need clear guidelines within which to work. People need to know what is expected of them, how to go about it and why it is important.

Why Train?

The Mentoring Conversation involves a suite of skills. The mentoring model is derived from counselling and coaching practices but is not either. It is based on adult learning, problem-solving, decision-making and strategic planning. Mentoring is different from other workplace relationships. It is professional and personal, it deals with rational and emotional motivation and it non-directive but offers guidance and advice! The paradoxical nature of mentoring needs to be understood and the skills developed.

In addition, participants usually need ongoing personal support and reassurance as well. Establishing an interactive network of participants will add value. This is most likely to happen when participants meet and work together in training workshops.

Effective mentoring results from a set of attitudes, behaviours, skills and motivation. Training, complemented by ongoing support and monitoring of results, supports the development and use of mentoring.

The role of the mentor, communication styles, strategies and practical techniques for applying the mentoring process can be explored in workshops. It is usually beneficial to provide mentors with an initial session separately from the mentorees so that they are able to discuss any issues candidly.

Mentorees need to be primed to make the most of the mentoring experience. Their responsibilities, communication and goal setting are topics you want to cover in their training.

Bringing mentors and mentorees together for a workshop is highly desirable. This way you can enable them to identify expectations of each other in a non-threatening group process. You can also ensure that they have a common understanding of mentoring etiquette, procedures and reporting. Being part of a group reduces the feeling of isolation and you can set up a mechanism for ongoing group contact. Within this workshop mentoring pairs can have a structured first meeting to break the ice. Debriefing the meeting as a group, you can draw out do's and don'ts for effective future meetings.

The Training Process

The process of the training is as important as the content and several issues are likely to impact on your mentoring program:

- Current management style – managing people is different from mentoring people;
- Seniority of the mentors – building a relationship of rapport and trust when there are many individual differences; and
- Introducing a new role to busy people may be challenging. Motivation will be critical to success.

Appropriate training will address these issues. The program outlined below provides some examples of workshops you could offer.

Sample Training Program

Workshop One: Mentoring Success Factors

The purpose of this workshop is to:

- Introduce the mentoring concept;
- Develop understanding of the strategic value of mentoring; and
- Provide a basic knowledge of the role of mentors.

This half-day workshop is highly interactive. It is conducted for mentors and mentorees together. The methodology is designed to begin to break down barriers between senior and more junior staff; provide an environment that enables individuals to express themselves through group-work, which is less threatening; and allow participant input that identifies the critical characteristics of mentoring. The workshop is deliberately kept short, so that participants will go away thinking about a small number of significant points. They will be tasked to come to the next workshop with questions and issues they wish to raise.

Content includes:

1. The Mentoring Concept
2. Benefits of Mentoring
3. Qualities for effective mentoring

Workshop Two: Mentoring Skills

This one-day training covers:

- Mentoring Roles and Responsibilities
- The Development Spectrum
- The Mentoring Process
- Mentoring Skills Self-Assessment
- Communication Styles (Authoritative/Facilitative)
- Listening Skills
- Questioning Techniques
- Practical Applications
- Giving and Receiving Advice
- Open Forum (discussion)

Separate workshops are conducted for mentors and mentees so that each group can comfortably raise issues, voice concerns and ask questions.

Workshop Three: Mentoring Action Plan

This half-day workshop is a joint session where paired mentors and mentorees attend together. During this workshop, the pairs would have an initial one-to-one meeting. They will be provided with a structured meeting guide and participate in a group debrief concerning general mentoring meeting principles. This session includes:

- The Mentoring Conversation
- Action Planning
- The First Mentoring Meeting

Mid-Point Review

A mid-point review provides a chance to check on progress, identify any issues and address them. It allows participants to discuss achievements and problems and ways to get the most out of the remainder of the program. Typically, participants report renewed enthusiasm and increased confidence as a result of the mid-point review.

Halfway through the program participants are brought together as a group and invited to review:

- What aspects of the program are working well and what could be changed;
- Personal outcomes to date and level of satisfaction with the program; and,
- What needs to happen to ensure participants get the most out of the remainder of the program.

Individuals develop personal action plans.

An evaluation survey based on issues raised can be designed to obtain individual input. The results are report collated and any adjustments to the program that may be required are made.

Finalé

To conclude the program, a final session will celebrate the achievements, acknowledge the contributions of participants, and gather feedback and suggestions for improvement for future programs.

The Finalé also provides a point of closure for participants (although they may decide to continue informal mentoring relationships). The review process is followed by an informal social event (drinks/lunch).

Step Five
Pilot the program

Pilot Your Program

Now comes the real test! You have to run the program for a small number of people and gauge the results.

First, decide how many people will participate. There need to be enough to provide a meaningful sample for evaluation but not too many to manage and monitor. Ten to twelve pairs is a typical pilot group size. Ten to twelve people provide a good group dynamic for the training sessions you run for mentors and mentorees separately and twenty-four is about the upper limit for a joint workshop. Your first program also needs careful monitoring. The more people you have in it the harder it is to maintain regular personal contact with each one.

Make sure that you have everything prepared (review the coordinators checklist in the last section of this book).

Announce the program with as much support from senior levels as you can get. Let everyone know about it, not just the target group. Communicate in as many different ways as possible. Treat this like a marketing campaign.

Recruit volunteers to participate as mentors and mentorees. Be very selective. Choose people who have the most chance of achieving the outcomes the program is aiming for. You want people with enthusiasm and ability. Their success will pave the way for others in the future.

Implement your planned process of matching mentors and mentorees. Train them and begin evaluating immediately (see Step Six: *Evaluate The Program*). Get feedback from participants about what they felt worked and did not work so well. Stay in touch with each of them. Make frequent informal contact by phone or face to face if you can. You want them to see your involvement as friendly and supportive not intrusive supervision. Send additional information by email or hard copy but don't overload them.

Make sure participants have a calendar of events and activities and encourage them to attend together. Help them build a network so that they feel attached to the group and to the program not just an isolated pair.

Document everything you do so that you will have a reference for next time or a hand-over manual for someone else to follow. Log your time so that you can reflect a realistic cost in your program evaluation. Keep a journal of challenges and personal satisfaction.

The purpose of a pilot program is to test your hypothesis that mentoring will achieve certain outcomes. What constitutes success? How do you evaluate the results? What will you measure? The next chapter examines these issues.

Step Six
Evaluate the program

Evaluate Your Mentoring Program

What is Evaluation?

According to Chris Milne, director of ARTD Management and Research Consultants, evaluation is:

“Assessment of value or worth of something based on systematic evidence”.

Evidence may be qualitative as well as quantitative, it is systematically collected using the tools of social research, and it must be credible in the eyes of the stakeholders.

The starting point for evaluation has to be the stated objectives of the program. Various stakeholders will have their own view of what constitutes success criteria. This is why their input is critical at the beginning of your planning process and management sign-off of your documented project plan is worthwhile.

Chris Milne, believes that effective evaluation means being clear about what you're after but remaining open to additional possibilities. While formulating ways to elicit performance information about program objectives, additional information about other results may come to light. Indeed, unexpected outcomes may produce the most value for organisations and individuals. Mentoring often facilitates the diagnosis of organisational problems and these may be overlooked by purely outcome-oriented evaluation.

Broad goals such as those listed below (taken from actual mentoring programs) are challenging to evaluate, particularly in the short-term. Furthermore it is not possible to prove a cause and effect relationship. However, evaluation provides evidence that the program outcomes are consistent with contribution toward organisational goals.

Strategic Objectives	Program Aims
<ul style="list-style-type: none">• Reduce staff turnover• Become “employer of choice”• Knowledge management• Succession planning• Diversity & equity	<ul style="list-style-type: none">• Support for new employees• Career development• Career planning• Skills development• Personal development planning• Improve communication across organisation• Share tacit information• Develop targeted staff• Build relationships

Other Factors Influencing Outcomes

Mentoring programs do not take place in a vacuum. Organisations have dynamic environments and many factors outside the program may influence outcomes. A balanced evaluation takes these factors into account. For example, an organisational restructure may affect the number of applications received. Only a small pool may be available from which to draw mentors and this has implications for the ability to make appropriate matches and whether relationships last.

Why Evaluate Mentoring Programs?

Evaluation may be:

- Symbolic – you do it because it is expected;
- Political - you do it because you have to;
- Pragmatic – you do it as a requirement for ongoing funding;
- A management tool – you do it to improve outcomes.

In a survey of mentoring coordinators, almost all reported that they had undertaken, or were planning to conduct some form of evaluation of their programs. Some had evaluated half-way through the program as well as at its conclusion, some evaluated continuously. They said that they needed evaluation to:

- Justify the program's existence
 - Find ways to improve the program
 - Identify benefits for participants and the organisation
 - Determine whether the expected outcomes had been achieved
 - Discover any unexpected outcomes
 - Resolve problems and change direction
 - Assess the degree to which objectives were met
 - Gather information to use in marketing
 - Measure participant satisfaction
 - Report success
 - Obtain proof that key performance indicators had been achieved
 - Look at relationships that were continually evolving and constantly changing
 - Identify actual benefits (not just "key performance indicators").
 - Achieve accreditation (a quality program requirement)
 - Celebrate success
 - Align mentoring with other programs
 - Obtain attrition statistics
 - Find out if it made a difference
 - Determine whether it changed the attitudes, beliefs and behaviour of managers
 - Meet the requirements of the funding body
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Planning The Evaluation

Planning evaluation is part of the program design process. Evaluation involves collection of data and the use of that data to answer questions and make judgements about the program. Therefore, planning evaluation begins with the identification of the questions that need to be answered and the criteria against which judgements will be made.

During the program design phase you need to identify:

- Attributes of success – in the context of your mentoring program, what does a successful outcome look like?
- Information needed – what performance measures will you require?
- Data sources – what information can you collect?
- Strategies – How will you measure success?
- Extraneous factors – what else may have influenced the outcomes?
- How and to whom will you report?

What To Evaluate

The evaluation will examine the following aspects of your mentoring program:

Processes	Mentoring	Participant Support	Outcomes
Recruitment Selection Matching Communication	Relationships maintained Quality	Training Materials and resources Other support activities	Mentorees Mentors Organisational

Sources from which the data can be elicited include the participants who may be surveyed or interviewed and various records that can be accessed.

How To Evaluate

Basically you have two avenues to assess outcomes:

1. Qualitative – ask the participants their opinions
2. Quantitative – numerical and statistical data

Techniques for evaluation include:

- Informal contact by the program coordinator
- Questionnaires at intervals over the life of the program
- Group review processes
- Individual interviews
- Participant narratives or extracts from journals volunteered
- Post-program follow-up
- Before and after data e.g. statistics on retention, promotions or job applications

The simplest way to evaluate is to ask participants what they thought. While opinions provide qualitative data, responses can be quantified, as shown in the sample below. A mentoring program evaluation questionnaire is included in last section of this book: Templates, Worksheets and Checklists

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To what extent do you agree that this program is contributing to the following objectives? Please ✓ the response that most closely represents your view.

		1	2	3	4
	Program Objectives	Strongly Disagree	Disagree	Agree	Strongly Agree
1.1	Motivate and retain high potential employees				
1.2	Assist with career management				
1.3	Develop strategic insight and greater understanding of the organisation				
1.4	Provide feedback and advice to high potential employees Grow new leaders within the organisation				

Open-ended questions also yield valuable qualitative data. For example:

- 1.5 *What do you believe the program has achieved for the organisation?*
- 1.6 *What do you believe the program has provided for individuals?*

You can use a similar process to obtain participant reaction to training. For example:

To what extent do you agree with the following statements? Please ✓ the response that most closely represents your view.

		1	2	3	4
		Strongly Disagree	Disagree	Agree	Strongly Agree
1	I enjoyed the workshop				
2	I learned some things that I can use				
3.	The information was delivered in effective ways				
4.	The course content was logically organised				
5.	The activities added to the understanding of the concepts presented				
6.	Participant materials (books, handouts) were useful				
7.	Overall I was satisfied with the presentation				
8.	I would recommend this course to others				

Quantitative Data

Some aspects can be measured numerically quite easily and quickly. For example:

- How many participants completed the program?
- How many mentoring relationships were maintained for the life of the program.
- How frequently did mentoring pairs have contact?
- Percentage of new starters retained after one year, two years, three years
- Number of target group applying for higher positions

Before and after measures provide tangible evidence of results but a longer-term evaluation will be necessary because outcomes may not be immediate. These measures are also susceptible to other influences, so the cause and effect relationship may be muddled.

As an example, the following measures were selected for a mentoring program for Aboriginal and Torres Strait Islander (ATSI) people in an Australian government agency:

- Ratio of ATSI to non-ATSI staff in the Department;
- Proportion of ATSI to non-ATSI staff in each grade;
- Representation of ATSI staff in various roles, positions and locations;
- Percentage of applicants for internal jobs (promotional) who are ATSI;
- Number of ATSI staff who obtain a position or promotion;
- Number of ATSI staff participating in training programs and development opportunities;
- Number of external ATSI applicants for jobs in the Department; and
- Benchmark comparisons with other Agencies and Government targets.

*Templates, Worksheets
And Checklists*

Templates, Worksheets and Checklists

The following may be reproduced for your personal use:

1. Specify Objectives
2. Coordinators Checklist
3. Design Checklist
4. Expression of Interest
5. Program Evaluation

Co-ordinators Checklist

- Prepare information package including mentoring guidelines
- Publicise the program within the organization
- Distribute information
- Schedule training and other functions
- Book and prepare venues, materials, refreshments etc.
- Book and brief speakers and presenters
- Publish calendar of events
- Obtain or prepare participant resource material
- Recruit and select mentors and mentorees
- Match mentoring pairs
- Provide support to mentors and mentorees
- Communicate with managers and staff not involved in the program
- Organise group meetings and review process
- Get people to attend events
- Arrange payments for costs incurred
- Maintain records
- Arrange acknowledgement of mentors
- Follow-up all participants at prescribed intervals, monitor progress
- Collect evaluation data
- Report Results
- Prepare proposal for next program, using the learning from this one to make adjustments.

Design Checklist

1. What is our definition of mentoring?
2. What are the objectives of the program?
3. Who is to manage & co-ordinate the program?
4. Have we documented the design - listed the components to be included in the program and the steps in the process with a timeline?
5. Do we have a documented communication plan?
6. Do we have action plans with tasks allocated and timeframes agreed?
7. Have we identified the resources required?
8. Have we estimated the budget required?
9. Do we have a timeline of events? Milestones? Review / reporting dates?
10. Do we have management buy-in? Sign-off?
11. What are the selection criteria for participants?
12. How will we recruit participants?
13. How will we match participants?
14. What training will we provide to participants? When?
15. How will we support the mentors?
16. How will we support the mentorees?
17. How will we support the program coordinators?
18. How will we monitor participant satisfaction?
19. How will we maintain enthusiasm for the program?
20. How will we evaluate the program?
21. To whom and how will results be reported

**Expression of Interest
XYZ Mentoring Program**

I am interested in (please tick): having a mentor being a mentor (may use separate forms for mentor/mentoree and colour code)

Name

Job Title

Length of service with this organisation

Address for correspondence

Phone, business hours, after hours, mobile, Fax ,email

1. Overall, what do you want to achieve by participating in the Mentoring Program?

2. What professional development have you previously initiated (Please list TAFE/tertiary courses, short courses, qualifications/accreditations etc., that you are currently undertaking or have completed):

3. For people seeking a mentor: Do you know who you would most like as a mentor? If so, please list below three people, in order of preference. If you do not know who you would like as a mentor, describe the type of mentoring or characteristics of a person who might meet your needs.

1.

2.

3.

Alternatively, tick this box to indicate that you wish to discuss your mentoring needs .

4. What information about you would help in matching you with an appropriate mentoring partner?

5. Do you have your supervisor's agreement to your participation in the program?

6. Please indicate: I am/am not available to participate in the Mentoring Workshops on (dates).

Mentoring Program Evaluation

Your feedback is important to the success of future programs. Please be as candid as possible. You may remain anonymous if you wish.

Name:(Optional)	Are you a	Date:
	Mentor / Mentoree?	

1. Program Outomes

To what extent do you agree that this program is contributing to the following objectives? Please ✓ the response that most closely represents your view.

		1	2	3	4
	Program Objective	Strongly Disagree	Disagree	Agree	Strongly Agree
1.1	Supporting staff to develop work-related skills and knowledge;				
1.2	Facilitating career planning and				
1.3	Providing practical assistance in my career development				
1.5	Encouraging my continued professional development				
1.6	Improving communication and networking;				

1.7 What do you believe the program has achieved for the organisation?

1.8 What do you believe the program has provided for individuals?

2. The Program Itself

- 2.1 What do you feel went well in the program?
- 2.2 What do you think could be improved for any future program?
- 2.3 Overall, how would you rate the value of this program?

1	2	3	4
Little Value	Moderate Value	High Value	Very High Value

3. Your Personal Mentoring Experience

To what extent has your own experience match the description below? Please ✓ the response that most closely represents your view.

		1	2	3	4
		Not at all	Slightly	Moderately	Greatly
3.1	Mentoring is a process by which an individual (mentoree) strives to achieve development goals under the guidance of another individual with special expertise (mentor).				
3.2	Mentoring is about helping people to find answers, to develop their own solutions.				
3.3	Mentoring is a relationship that gives people the opportunity to share their professional skills and experiences, and to grow and develop in the process.				

3.4 Comment about your mentoring experience

4. Your Goals

4.1 Did you set a personal development goal? Yes/No

4.2 If so, did you achieve it? If not, what prevented you?

4.3 Comment about your goal setting and achievement

5. Any Other Comments

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