Evaluating Mentoring

by Ann Rolfe

Mentoring Works!

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Introduction

Evaluating mentoring is one of the top concerns identified in our survey of program organisers. In this ebook, I’m going to share with you important ideas about how and what to measure.

I’ve been helping organisations design and implement mentoring programs since 1994. I have worked with mentors and those who are mentored in Australia and overseas. I have reviewed many mentoring programs and seen what works and what doesn’t.

With ever-increasing demands on resources, it is critical that mentoring is shown to have a positive impact on the organisation that invests in it and the people involved.

It is also important to check how effective the mentoring is, just what people are gaining from the program and whether there are ways to improve.

Mentoring is all about producing better outcomes for individuals and organisations. So, if you want to ensure that yours does, read on and discover:

- What return on investment can be reasonably expected;
- How to put “hard” measures on “soft” values; and
- What and how to evaluate in your mentoring program!

Enjoy!

Ann Rolfe
What Is Evaluation?

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

“Assessment of value or worth based on systematic evidence”
Questions and Judgements

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 looks like?

• Information needed – what performance measures will you require?

• Data sources – what information can you collect?

• Strategies – How will you measure success?

• How and to whom will you report?
What To Evaluate

There are three main areas to evaluate:

1. **The Program** – recruitment, selection, matching and communication processes; and participant support, including, training, materials, resources and support activities.

2. **The Mentoring** – whether relationships were maintained and their quality.

3. **Outcomes** – for mentorees, mentors, organisation.

Sources from which the data can be elicited include the participants, who may be surveyed or interviewed, various records that can be accessed before and after, and evidence collected as part of the mentoring program.

This will give you two types of data you can use to assess outcomes:

- **Qualitative** – based on opinions
- **Quantitative** – numerical and statistical data
You Can’t Measure Everything

Understand that you can’t measure everything.

Incremental change may go unnoticed as people grow and develop over time. A single conversation can change the course of a life but how would you know?

So keep in mind that evaluating mentoring captures the tip of the iceberg, what is visible above the surface. Perhaps as much as 9/10ths of the value of mentoring may remain unseen because some of the benefits of mentoring are subtle or intangible, they may be very long-term, remain unknown, or unconscious.

Yet, I believe that whether you use sophisticated metrics or simply ask participants, it is important to gain feedback on mentoring to evaluate whether:

• the mentoring relationships worked;

• mentoring made a difference; and

• if mentoring contributed worthwhile organisational outcomes.
Why Evaluate?

Usually you need to identify measurable outcomes that will indicate a return on investment.

Occasionally, an organisation is more concerned with really living its espoused values (ROI may be a bonus). Never the less you want to know if the program is achieving its purpose.

In a survey of program coordinators, the reasons they evaluated might be characterised as follows:

• Symbolic – you do it because it’s expected
• Political – you do it because you have to
• Pragmatic – you do it as a requirement for ongoing funding
• Management Tool – you do it to improve outcomes
Strategic Value, Personal Benefit

Mentoring aims to deliver strategic value for the organisation as well as personal benefits for individuals.

In my opinion, you evaluate to ensure that your mentoring strategy achieves these outcomes. You can’t do this unless you have clarified the strategic purpose of mentoring, in other words - why is mentoring important?

Without clear, and meaningful goals, you may find it hard to gain support for mentoring, difficult to promote the value of mentoring and challenging to make it a priority for people.

To ensure your mentoring strategy works you have to answer the question "why mentoring?"

You need to uncover the needs, wants and issues that mentoring will address from the perspective of the organisation and the people you want involved.

So you need to plan your evaluation from the beginning of the design process of your mentoring program.
What Does The Organisation Need?

Most often, mentoring is used by organisations striving for:

**Employee engagement** - to attract, retain and develop people for increased productivity;

**Knowledge management** - to prevent the loss of both tacit and implicit information

**Skills development** - for improved capability; or

**Culture change** to influence behaviour based on values, assumptions, and common practice, for enhanced organisational performance.

Which of these capture the strategic aims of your mentoring program?
What Will People Achieve?

Once you have identified why you want a mentoring program from a strategic viewpoint you can distil these reasons into specific objectives for the mentoring program.

Consider the people who will be mentored, what you hope they will achieve through mentoring and the tangible results you could measure. Remember that there are many ways to achieve the strategic aim.

Now draw up three columns on paper or a whiteboard to identify what you can measure. Head your columns:

**Strategic Aims - organisational need**

**Program Purpose - broad aims, focus**

**Realistic Objectives - measurable outcomes**

The next page shows some examples of strategic aims and program purposes
Strategic Aim

- Reduce staff turnover
- Become “employer of choice”
- Knowledge management
- Succession planning
- Diversity & equity

Program Purpose

- Support for new employees
- Skills development
- Career development
- Personal development planning
- Improve communication across organisation
- Share tacit information
- Develop targeted staff
- Career planning
- Develop targeted staff
- Build relationships

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Objectives - The Foundation

To create realistic objectives we have to ask:

- What might indicate success?
- What could you measure?
- What tangible outcomes would you expect?
- How else would you know whether the program was successful or not?

In terms of ROI, you may or may not need to put a dollar value on outcomes but if you want to know if your mentoring works, at the very least you’ll have to identify success indicators.

Start thinking about them now, see how many you can list …

The bottom line is that you have to know specifically, what you want your mentoring strategy to do before you can figure out how you will know that it is working.

This should be the foundation for designing your mentoring program and you should do this in the early planning stages.
Return On Investment

Here are some of the things that can be quantified:

• Staff retention

• Return to work after maternity leave or injury

• Representation of target group (eg minority or disadvantaged) in grade, roles, positions, locations

• Percentage applications for internal jobs or promotions

• Number in target group who won a position or promotion

• Number who participate in training, education or development opportunities

• Number of external applicants for jobs in the target group you want to attract

• Benchmark comparison, industry average, other organisations
Measuring The Value

Sometimes it is easy to estimate a dollar value. A lot of organizations have mentoring programs specifically designed to attract and retain graduates. They spend a lot of money on recruiting graduates and they know that there is no return on their investment if they lose a new person within 2-3 years.

Gen Y has been notoriously career-oriented and mobile. Some organisations, such as government agencies cannot pay big dollars to get or keep graduates, so mentoring is a cost-effective strategy for retention.

You can probably find some figures within your organisation or industry regarding the replacement cost of staff. Obviously it varies depending on the role but a ballpark estimate of around 2-3 times annual salary per person is a starting point. You can’t ignore this kind of money. Likewise, many organisations are not ready for the exodus of experience when baby-boomers retire. Being mentors can help keep them, engage them and increase their productivity while facilitating knowledge transfer.

Another way to evaluating ROI is to look at the cost of not having mentoring. A major bank was a trailblazer twenty years ago, with mentoring as part of a suite of programs for women on maternity leave. The bank realised the long-term cost of losing talent and experience far outweighed the investment in the mentoring program. More recently, another organization had a career-focussed mentoring program during a job freeze! Participants spent 12 months enthusiastic about their employer and confident about their future instead of succumbing to disenchantment. I wonder what that did for their productivity?
An Evaluation Plan

Before the mentoring program begins, you should have thought about, discussed with stakeholders and documented an evaluation plan that includes:

• Attributes of success – criteria, measures or evidence
• Information needed – before during after
• Data sources – where can you access relevant information?
• Methodology – how will you collect, collate and analyse the data?
• Reporting - what feedback is required, in what form and for whom.

Far too often we collect data from participants and don’t feed it back. People soon get disillusioned if their thoughts get sucked into a vacuum. So don’t forget to share at least some of the evaluation results with mentors and mentorees themselves.
How Do You Know Mentoring Works?

Plan to gather both qualitative and quantitative data before, during and after the mentoring.

**Early Follow-up** - check in with people soon after the program launch to ensure that they have made contact and begun the mentoring relationship;

**Monitor** - stay in touch, build two-way communication, identify any potential problems and resolve them sooner, rather than later;

**Mid-point Review** - get the group together, face-to-face or via webinar. Workshop what's working well and what could improve. Help them create strategies to gain the most value from their mentoring.

**Finalé** - a final group event gives closure to participants. Make it special and acknowledge their contribution. This is the time to recognise their achievements and take feedback for improvement for future programs. Questionnaires can be used to elicit their evaluation and quantify qualitative input.

**Post-program** - schedule review of longer-term success indicators at appropriate intervals. Mentoring will show immediate benefits but the greatest gains come from the enduring effect of mentoring.
Evaluation Methods

• Before & after measures - data from records

• Reaction surveys – unkindly known as smiley sheets, these are the questionnaires routinely handed out at the end of a workshop. Often useful feedback, they'll certainly tell you what people loved & hated

• Learning journal – participants track their own progress by keeping a diary or logbook in which they record their thoughts, feelings and actions

• Monthly review – informal follow-up, checking in with people

• Individual interviews – periodic personal conversations with some structure

• Focus groups or workshops – gathering mentors and mentorees together or separately for activities to elicit how things are going

• Survey Questionnaire – gathering participant opinions about elements of the program
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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 muddied. The numbers don’t give a complete picture. This is why you need to talk to people and obtain information and opinions for clarity.
Hard Measures From Soft Data

You can take qualitative data produced by participants and transform it into quantifiable measures by asking questions with:

• rating scales (to what extent …)

• ranking relative importance (list in order of importance) or

• Percentage estimates (what percentage of your time did you …)

Ratings are often combined with phrases in a semantic differential scale. For example:

To what extent do you agree with the following statements?

Please the response that most closely represents your view

Evaluation is one of many ways to ensure that your mentoring works.

Visit our website to learn more and join The Mentoring Network Online where you can comment, ask questions and connect with colleagues involved in mentoring around the world.

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Additional Resources

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