

LESSON 36

MENTORING AND COACHING

Training, Coaching, Mentoring - Developing People

There are many different training and development methods. On-the-job training, informal training, classroom training, internal training courses, external training courses, on-the-job coaching, life-coaching, mentoring, training assignments and tasks, skills training, product training, technical training, behavioural development training, attitudinal training and development, accredited training and learning, distance learning - all part of the training menu, available to use and apply according to individual training needs and organisational training needs.

Training is not just found in the classroom - it's anything offering learning and developmental experience. Training and development includes attributes such as: ethics and morality; attitude and behaviour; leadership and determination, as well as skills and knowledge. Development isn't restricted to training - it's anything that helps a person to grow, in ability, skills, confidence, tolerance, commitment, initiative, inter-personal skills, understanding, self-control, motivation, and more.

All supervisors and managers should enable and provide training and development for their people - training develops people, it improves performance, raises morale; training and developing people increases the health and effectiveness of the organization, and the productivity of the business.

The leader's ethics and behaviour set the standard for their people's, which determines how productively they use their skills and knowledge. Training is nothing without the motivation to apply it effectively. A strong capability to plan and manage skills training, the acquisition of knowledge, and the development of motivation and attitude, largely determines how well people perform in their jobs.

Training is essential for the organisation. It helps improve quality, customer satisfaction, productivity, morale, management succession, business development and profitability.

Training planning and training itself is a step-by-step process –

Training ('Induction Training') is especially important for new starters. Good induction training ensures new starters are retained, and then settled in quickly and happily to a productive role. Induction training is more than skills training. It's about the basics that seasoned employees all take for granted: what the shifts are; where the notice-board is; what's the routine for holidays, sickness; where's the canteen; what's the dress code; where the toilets are. New employees also need to understand the organisation's mission, goals and philosophy; personnel practices, health and safety rules, and of course the job they're required to do, with clear methods, timescales and expectations.

Managers must ensure induction training is properly planned - an induction training plan must be issued to each new employee, so they and everyone else involved can see what's happening and that everything is included. You must prepare and provide a suitable induction plan for each new starter.

An organisation needs to assess its people's training needs - by a variety of methods - and then structure the way that the training and development is to be delivered, and managers and supervisors play a key role in helping this process. They also should be 'topping-up' the development of their people through their own direct efforts. This type of development should also include mentoring and coaching, which is very effective in producing excellent people, and should be used as an additional training method alongside formal structured training courses.

It's important that as a manager you understand yourself well before you train others - your own skills (do you need training in any important areas necessary to train others?) - your own style (how you communicate, how you approach tasks, your motives - they all affect the way you see the role and the person you are training).

And it's vital you understand the other person's style and personality too - how they prefer to learn - do they like to read and absorb a lot of detail, do they prefer to be shown, to experience themselves by trial and error? Knowing the other person's preferred learning style helps you deliver the training in the most relevant and helpful way. It helps you design activities and tasks that the other person will be more comfortable doing, which ensures a better result, quicker. Various models and tests are available to help understand learning styles .

ACTIVITY-MENTORING TRAINING

'Activity-mentoring' training is a highly productive and effective modern method of training and developing people in organizations, especially for staff in teams and departments, **and for developing organizations themselves**. The approach builds on management by objectives (MBO's) principles, but is more participative, voluntary and inclusive. By comparison, MBO's are a 'one-way street'; isolated and individually separate, prescribed along a single-channel towards a task focus. Well-facilitated 'activity mentoring' is consensual, team-orientated, with a personal development and team building focus, across multiple organizational interfaces, particularly to and between management/subordinate/peer levels. Activity mentoring methods also help develop systems (not IT and processes, but overall systems: ie., how an organization works), organizations, management and communications, in an open, dynamic, organic, three-dimensional way. The activity-mentoring approach uses several integrated techniques which produce more reliable and relevant training outputs, in terms of individual skills, attitudinal development, and direct job and organizational performance improvement. The approach is **facilitative rather than prescriptive**, and broadly features:

- strategic assessment of organisational and department priorities and 'high-yield' training needs
- interpreted discussion with line-managers of training delegates and strategic managers of the organisation
- pre-training skills/behavioural needs-analysis - all training delegates - and pre-training preparatory work
- small groups - practical workshops - short sessions - highly participative and situation/solution-based - focused on practical job issues, individual personality/learning style and organisational priorities

- individually agreed tasks and assignments - focused on practical priorities and individual needs
- follow-up coaching and mentoring one-to-one support - giving high accountability and reliable deliverables
- ongoing feedback and review with line-managers and strategic managers - coaching/task notes for line managers

The process works on several different levels: individual, team, task, organisational and strategic. Activity mentoring also gives strong outputs in skills, behaviour and job priority areas, as well as being strongly motivational and where necessary resolving conflict and attitudinal issues.

MENTORING COST ANALYSIS AND JUSTIFICATION

Mentoring can be provided in various ways and programmes take a variety of shapes. Mentoring can be external, where the mentoring is essentially provided by external people, or an internal activity, using mentors within the organisation.

Due to the newness of mentoring as an organised process, and because mentoring programmes are so varied, statistics as to general costs and returns across industry are not easy to find. Here however are general cost indicators for a program essentially delivered by internally appointed mentors.

The main elements of a mentoring programme that carry quantifiable cost would be:

- **Training of mentor(s)** - comfortably achievable for £1,000/head - it's not rocket science, but selection of suitable mentor is absolutely critical - good ones need little training; poor ones are beyond any amount of training.
- **Mentor time away from normal activities** - needs to be a minimum of an hour a month one-to-one or nothing can usefully be achieved, up to at most a couple of hours a week one-to-one, which would be intensive almost to the point of overloading the mentoree. That said, there may be occasions when the one-to-one would necessarily involve a whole day out for the mentor, for instance client or supplier visits. Say on average a day a month including the associated administration work.
- **Overseeing the program, evaluating and monitoring activity, progress and outputs** - depends on the size of the program, ie number of mentors an number of mentorees - if the mentoring is limited to just a single one-to-one relationship then it's largely self-managing - if it's a programme involving several mentors an mentorees then I'd estimate an hour per quarter (3 mths) per one-to-one mentoring relationship - probably the responsibility of an HR or training manager. If this person with the overview/monitoring responsibility needs external advice you'd need to add on two or three days consultancy costs.
- **(Mentoree time away from normal activities** - effective mentoring should ideally integrate with the mentoree's normal activities, and enhance productivity, effectiveness, etc., so this is arguably a credit not a debit.)

Having said all this, unless the training aim is simply to impart knowledge, for which conventional classroom training and course work are very appropriate, I'd go for mentoring every time, especially if the aim is to truly develop people and organisational effectiveness.

WHAT IS WORKPLACE MENTORING?

Mentoring - the presence of caring individuals who, along with parents or guardians, provide young people with support, counsel, friendship, reinforcement and a constructive example - is a strategy that can help young people of all circumstances to achieve.

Throughout history, older people have been mentors to young people, mostly through informal, spontaneous arrangements. According to the July-August 1978 Harvard Business Review article *Everyone Who Makes It Has a Mentor*, mentoring has always been an integral part of the career advancement of the business executive. Today, mentoring is emerging as a formal process to assist young people, often used in conjunction with existing development programs involving education, job training or life skills.

Workplace mentoring:

- Offers young people the chance to develop a relationship with one or more employees who become friends, role models and advocates for them.
- Typically takes place at the workplace, either during or after school hours.
- Can take several forms, including tutoring, job shadowing, career exploration and game playing.
- Typically asks the mentor for a commitment of at least one year.

ARTICLE:

**How to Develop
An Operations Manual For
Your Mentoring Program**

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For:

The EMT Group

Development of an Operations Manual

The Operations Manual is based on the ten Recommended Best Practices for Mentor Programs (QAS) for Youth Mentoring Programs. Experienced program managers understand that the Recommended Best Practices for Mentor Programs are vital in creating safe and effective programs. Essentially a framework for best practices, these standards are also recognized as a valuable tool for promoting mentee safety and personal growth.

When first learning how to develop a mentoring program, it takes new program managers a long time to understand how utilize the standards. It's our belief that their use can be simplified if program managers develop an operations manual as described below. Remember, the primary uses of an operations manual are A) to develop strategies to be used in running the mentoring program, and B) to chronicle the development of operational procedures so that they can be passed on to subsequent program staff.

Here's how to begin the development of your operations manual:

- Purchase a 1 1/2 to 3 inch plastic three-ringed-binder from your office supply store.
- Purchase a set of 15 (or more) subject dividers.
- On the first 10 dividers, put the name of each of the QAS standards starting with "Statement of Purpose and Long Range Plan."
- Print a brief description of each of the standards (as given below) on the first page of each QAS section as a reminder of what the program is about.
- Throughout the program, chronicle any developments, timelines, plans, successes or failures, etc. in their respective categories.

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With the additional dividers, you can consider the following additional headings:

RISK MANAGEMENT: Make a separate heading Risk Management, and put the "QAS Risk Management Matrix" in it's entirety into this section. Follow the instructions in part ?? of this training that describe utilization of this tool

Narrative: This section can serve as a journal for the program. Whose idea was it to start the program? What personnel were on the original design team? Where did the funding come from? What were some of the early successes and failures? Subsequent program staff can benefit greatly from this information.

Recommended Best Practices for Mentor Programs: Obtain a copy of the Recommended Best Practices for Mentor Programs in their entirety and place in this section.

Sometimes it's good just to read through the standards to see if anything jumps out at you (that you may need to improve on).

Forms: Place program forms, letters, sign-off sheets, etc. in this section and periodically assess for possible updating.

Brief Descriptions of the Ten Recommended Best Practices for Mentor Programs

As previously noted, paste each descriptor on the first page of each subject heading in your operations manual. Then throughout the life of your program, place any materials, strategies, etc, which pertain to a particular standard in the appropriate divider. (There are longer descriptions available if you wish to place them here.)

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1. A **Statement of Purpose and a Long Range Plan** that includes:

- Who, what, where, when, why and how activities will be performed.
- Input from originators, staff, funders, potential volunteers, and participants.
- Assessment of community need.
- Goals, objectives and timelines for all aspects of the program.
- Funding and resources development plan.

Statement of Purpose and Long Range Plan is the guide that steers your program.

This plan begins with “mission statement” and “goals and objectives” and includes who will be mentored, how many, where, how often, by whom. Many aspects of this plan will be integrated into the mentor training manual, as well as other program materials.

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2. A **Recruitment Plan** for both mentors and mentees that includes:

- Strategies that portray accurate expectations and benefits.
- Year round marketing and public relations.
- Targeted outreach based on participant’s needs.
- Volunteer opportunities beyond mentoring (i.e., event organization, office support, etc.)
- A basis in your program’s statement of purpose and long-range plan.

A year-round **Recruitment Plan** is necessary to tap into resources such as service clubs, schools, corporations, businesses, and professional organizations to find mentors. This plan includes the development of key phrases, speeches, brochures, flyers, public service announcements, and media campaigns that accurately depict your program.

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3. An **Orientation** for mentors and mentees that includes:

- Program overview.
- Description of eligibility, screening process, and suitability requirements.
- Level of commitment expected (time, energy, and flexibility).
- Expectations and restrictions (accountability).
- Benefits and rewards they can expect.
- A separate focus for potential mentors and participants.
- A summary of program policies, including written reports, interviews, evaluation, and reimbursement.

The **Orientation** clarifies roles, responsibilities and expectations of mentors, youth, their

families, the mentoring program, and the school (if they are a partner). The orientation is a way of describing the program in detail, including the commitments and the terms of participation in the program. After the program manager lets everyone know what the program is about, they then ask the participants, “are you still interested?” Note that the mentor orientation is usually much shorter than the initial basic mentor training.

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4. Eligibility **Screening** for mentors and mentees that includes:

Adult Mentors

- An application process and review.
- Face-to-face interview.
- Reference checks for mentors which must include criminal history record checks (finger printing), and may include character references, child abuse registry check, and driving record checks.
- Suitability criteria that relate to the program statement of purpose and needs of the target population. Could include some or all of the following: personality profile; skills identification; gender; age; language and racial requirements; level of education; career interests; motivation for volunteering; and academic standing.
- Successful completion of pre-match training and orientation.

Youth Mentors

- An application process which must include a parental consent form.
- Face-to-face interview.
- Reference checks of at least two personal non-related adults.
- Successful completion of a pre-match training and orientation.

Screening sets the standards of who is eligible for the mentoring program. Safe programs set eligibility requirements and conduct fingerprint and background checks through the California’s Department of Justice (or through the FBI if the mentor candidate has been in

the area for less than two years). This process weeds out persons with felonies and other crimes which indicate the person would present a high risk for youth. Mentees are screened

by making sure they meet the eligibility criterion set by the program.

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5. A readiness and **Training Curriculum** for all mentors and mentees that includes:

- Trained staff trainers.
- Orientation to program and resource network, including information and referral, other supportive services, and schools.
- Skills development as appropriate.
- Cultural/heritage sensitivity and appreciation training.
- Guidelines for participants on how to get the most out of the mentoring relationship.
- Do’s and don’ts of relationship management.
- Job and role descriptions.
- Confidentiality and liability information.
- Crisis management/problem solving resources.
- Communication skills development.

- Ongoing sessions as necessary.

Training Curriculum: During the initial basic training, mentors learn more fully the requirements, policies and procedures of the program. In addition, mentors are trained on how to build a positive relationship with their mentee. Subject matter can include “proper mentor attitude and expectations, communication skills, diversity issues, child and adolescent development, confidentiality, child abuse reporting, goal setting, academic tutoring, etc.” These and other subjects will be covered during “on-going” trainings also. Ongoing trainings can take a number of forms such as round table discussions and support

groups, or even guest presentations.

The mentees’ training is typically shorter than the mentors’, as it mainly focuses on program

procedures, the process of building a stable relationship with an adult, as well as how to get

the most out of the mentoring relationship.

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6. A **Matching Strategy** that includes:

- A link with the program's statement of purpose.
- A commitment to consistency and accountability
- Appropriate criteria for matches, including some or all of the following: skills identification; career interest; gender; age; level of education; motivation for volunteering; and standing within the organization ; life experience; temperament
- A signed statement of understanding that both parties agree to the conditions of the match and the mentoring relationship

Matching Strategy: Each program needs a plan for matching mentors and mentees.

Programs should consider not only chemistry, but also interests and other elements, such as race and ethnicity, language, hobbies, etc. Expertise of mentors and difficulty the mentoring task also comes into play, as well as time availability of mentor and mentee.

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7. A **Monitoring Process** that includes:

- Consistent, scheduled meetings with staff, mentors, and participants
- A tracking system for ongoing assessment
- Written records and filing system
- Input from community partners, family, and significant others.
- A process for managing grievances, praise, re-matching, interpersonal problem solving, and premature relationship closure.

Monitoring the process of making sure the match is going okay. It is important to find out if the match is still meeting, program rules are being followed, and that everyone is relatively happy. Monitoring can also track the progress of the mentees’ function in such areas as school attendance, grades, referrals, general mood, etc.

Having mentors and mentees fill out program logs after each meeting is a central part of the monitoring process. Research shows that matches that are monitored are last longer and are much more successful than those that are not carefully monitored.

The monitoring process includes defining the rules for problem solving, early termination, as well the rematching of participants should a relationship end early.

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8. A **Support, Recognition and Retention Component** that may include:

- A formal kick-off event.
- Ongoing peer support groups for volunteers, participants, and others.
- Ongoing training and development.
- Relevant issue discussion and information dissemination.
- Networking with appropriate organizations.
- Social gatherings of different groups as needed.
- Annual recognition and appreciation event.
- Newsletters or other mailings to mentors, mentees, supporters, and funders.

Note: Support, Recognition, Retention is the only three-part standard.

Support means that each participant has a support system that they can rely on during the program. Support can mean assistance from the program manager and from peers. Periodic “ongoing trainings” and “group supervisions” are also essential in the support of program participants.

Recognition is a way of rewarding mentors and mentees for their involvement. Many programs enlist celebrations and awards as a way of saying thanks.

A **Retention** plan is important so that programs will have continuing participation of mentors and mentees. A retention plan focuses on celebrations, awards, and positive communication with program participants and with parents.

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9. **Closure** steps that include:

- Private and confidential exit interviews to de-brief the mentoring relationship between:
 - Mentee and staff
 - Mentor and staff
 - Mentor and mentee without staff
- Clearly stated policy for future contacts between mentor and mentee.
- Assistance for participating in defining next steps for achieving personal goals (for the mentee).

Closure: This is an element that is usually very brief in its development and implementation, but is very important. "Closure" means that the program has a strategy for letting participants (especially the mentees) know the length of the mentoring relationship, so that there won't be hard feelings upon termination. Improper closure could make the mentees experience feelings of abandonment and betrayal. Closure also gives program participants the opportunity to discuss with staff how they felt about the support (or nonsupport) from staff and the program in general. Finally, a sound closure policy also clarifies any future contact between mentors and mentees. To reduce program liability, send certified letters with return receipt requested, to document that mentors and parents have received notification that the match will no longer be supervised by the program.

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10. An **Evaluation** process based on:

- Outcome analysis of program and relationship.
- Program criteria and statement of purpose.
- Information needs of board, funders, community partners, and other supporters of the program.

The **Evaluation** is the report card for the program. How many youths were mentored by how many adults, and for how long? What costs were incurred? What was the experience of the mentor and mentee? What changes (if any) occurred in the mentee? Did they receive higher grades and testing scores? Less referrals? How did mentoring effect their social skills? Evaluations can include "self -evaluations" or more complex tools such as a "matrix model." Staff should allow mentors and mentees to evaluate the program as well as the trainings. Often called "satisfaction surveys, these evaluations are used to determine if the program is working and also to assess the need for changes and improvements.

Mentoring Progress Review

Mentor Version

How often do you meet with your mentee?

Where do you tend to meet? (Check all that apply)

In your office _____ Over lunch _____ On the telephone _____

While performing/observing specific job-related functions _____

Other _____

Where have you found to be the most productive place to meet?

What has been the most valuable aspect of mentoring to date?

Is your mentee ready to move on to a different mentor, or should this mentoring relationship continue? Is your mentee ready to become a mentor to someone else?

Do you feel that your mentee was committed to the mentoring relationship?

Has your mentee exceeded or lived up to your initial expectations? If not, please explain.

What is best about this mentoring partnership?

Are there any improvements that you would recommend to the mentoring program?

Additional Comments:

HR files this completed form in mentor's file for later reference.