Mentoring for Newly Appointed School Leaders

REQUIREMENTS MANUAL • VERSION 3 • JUNE 2010
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1. Introduction

1.1 The Purpose of this Manual

The purpose of this manual is to support school boards in their implementation of mentoring for newly appointed school leaders. The manual sets out the requirements boards will have in place in order to offer quality mentoring and provides tips regarding effective practices. Boards are expected to meet the requirements in order to receive funding as part of the Board Leadership Development Strategy (BLDS) in 2010–11.

Supporting resources, such as the Supporting Effective School Leadership: A Handbook for Implementing Mentoring for Newly Appointed School Leaders in Ontario (March 2009) and information about Mentoring workshops and programs are available through our principal association partners:

- Association des directions et directions adjointes des écoles franco-ontariennes (ADFO) - [www.adfo.org](http://www.adfo.org)
- Catholic Principals’ Council of Ontario (CPCO) - [www.cpco.on.ca](http://www.cpco.on.ca)
- Ontario Principals’ Council (OPC) - [www.principals.on.ca](http://www.principals.on.ca)

In 2010-11, school boards are required to implement mentoring as part of the Board Leadership Development Strategy (BLDS). This manual, the Board Leadership Development Strategy (BLDS) Requirements Manual, and additional resources are available on the Ministry of Education’s website at: [www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership).

*Note: this manual supersedes the School Board Guideline for Implementation of Mentoring for Newly Appointed School Leaders, Version 2, August 2009.*
1.2 Background: Leadership in Ontario Schools

Ontario’s education system is focused on three core priorities, as set out in *Reach Every Student: Energizing Ontario Education* (2008):

- high levels of student achievement
- reduced gaps in student achievement
- increased public confidence in publicly funded education

*Reach Every Student: Energizing Ontario Education* identified school leadership as a supporting condition for meeting these three core priorities. Research shows that school leadership is second only to teaching in its impact on student learning. Principals and vice-principals play a critical role in focusing decisions and actions on improving student achievement and well-being. They set directions, build relationships, develop people and the organization, lead the instructional program, and secure accountability. Their effectiveness as leaders is critical to the success and sustainability of system-wide improvement. School leadership matters.

1.3 Context: Ontario Leadership Strategy

To foster strong leadership, the government launched the *Ontario Leadership Strategy* (OLS). The OLS is a comprehensive plan of action aimed at attracting and developing skilled and passionate school and system leaders. The strategy promotes a collaborative approach through which schools, districts, education partners, and the ministry work in partnership to support student achievement and well-being. Launched in 2008-09, the strategy has evolved and will continue to be refined through ongoing research and consultation. The OLS is supported by the Ontario Leadership Framework (OLF) of effective practices, including the five Core Leadership Capacities (CLCs) (see below). More information on the Ontario Leadership Strategy is provided on the Ministry of Education website, at [www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership).

As part of the OLS in 2010–11, boards are required to develop a Board Leadership Development Strategy (BLDS) that fosters high-quality leadership throughout the board. The BLDS focuses on improving student achievement and well-being through effective leadership and supports the alignment of leadership development initiatives, including *mentoring for newly appointed school and system leaders* and *principal/vice-principal performance appraisal (PPA)*.

The *Ontario Leadership Framework* (OLF) provides the underpinnings for the mentoring for newly appointed school leaders and identifies effective practices and
competencies, skills, knowledge, and attitudes of successful educational leaders. The OLF is based on research by world-recognized experts in leadership and extensive consultation with educators across Ontario. The OLF provides a resource for school and system leaders to identify practices and competencies for building expertise in relation to a wide range of leadership capacities.

The Core Leadership Capacities (CLCs) are derived from the OLF and can be used as a focus for leadership development in the context of the OLF. The CLCs are as follows:

- Setting goals
- Aligning resources with priorities
- Promoting collaborative learning cultures
- Using data
- Engaging in courageous conversations

The ministry has made a commitment to these CLCs as a focus of ministry-sponsored professional learning and resources. School and system leaders use the OLF as a resource to identify practices and competencies that will be their focus for building expertise, including those related to the five CLCs. As contexts change and expertise grows, leaders identify new areas for development with respect to the OLF, including the five CLCs. In this way, they continuously improve their practice. More information on the OLF, including the five CLCs, is provided on the Ministry of Education website at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

1.4 Mentoring for Newly Appointed School Leaders

Mentoring for newly appointed school leaders directly supports the two goals of the Ontario Leadership Strategy, which are:

- to attract the right people to the principalship;
- to help principals and vice-principals develop into the best possible instructional leaders.

In place for three years, monitoring and evaluation of the mentoring for newly appointed school leaders initiative has confirmed the multiple benefits of mentoring among mentees, mentors and the education system.
Mentees benefit from support in learning the new leadership role, opportunities for professional reflection to guide goal-setting, increased confidence in their work and achieve identified goals.

Mentoring also provides a tremendous professional development opportunity for experienced school leader mentors. Experienced school leaders receive support and resources to become effective mentors, and to continue developing their own leadership competencies.

Schools, school boards and the ministry benefit from improved performance of new school leaders, increased capacity building across the system, increased student achievement and support for system priorities. Most importantly, students benefit from strong and effective school leaders.

1.5 Research Foundations

The provincial approach to mentoring for newly appointed school leaders is based on research, effective practice in Ontario and other jurisdictions, the design of the mentoring element of the New Teacher Induction Program (NTIP), the results of a Mentoring pilot for Newly Appointed School and System Leaders in 2007-08 and two years of province-wide implementation (2008–10.)

Steve Munby, Chief Executive of the National College for Leadership of Schools and Children’s Services in the U.K. insists that developing skills and behaviours must take place in the context of practical settings because people learn best and most powerfully in a real job setting. According to Munby, thirty percent of leadership development should be course work and seventy percent should be learning on the job. He maintains that you develop leaders by exposing them to opportunities to visit other places and see other practices. In order to learn on the job and be exposed to outstanding practice, you need access to coaching and mentoring from credible peers.¹

2. Mentoring and Leadership

2.1 Why Mentoring?

School leaders have a primary role in setting the vision and working in partnership with staff, students, parents, and the community to focus on student achievement and well-being. They serve as role models and community leaders, leading schools toward excellence through collaborative goal-setting and fostering collaborative learning cultures. They guide improvements in instruction by gathering and analyzing data effectively and inspiring staff to seek opportunities for continuous professional growth and development. School leaders oversee school operations and align resources to match priorities and they partner with parents to help students achieve their best. To succeed in this important and complex role, principals and vice-principals require a network of supports ranging from peer support to professional learning opportunities offered through the ministry, school boards and principal associations.

The first two years in a school leadership role are both rewarding and challenging. Newly appointed principals and vice-principals are making the transition to the role, enhancing their leadership practices and competencies, building relationships with the school community, and at the same time implementing key school, board and provincial priorities.

Mentoring is a powerful stimulus for the professional learning of new leaders. At the heart of it, mentoring provides support tailored to the unique role of newly appointed school leaders so they can be successful in this important stage of their leadership career. In the face of multiple demands and priorities, mentoring can accelerate learning, reduce isolation and increase the confidence and skill of newly appointed school leaders.

2.2 Fostering a Collaborative Learning Culture through Mentoring

Collaborative learning cultures in schools and boards are characterized by educators learning from each other as they work together with a common focus on improved student achievement and well-being. Mentoring can foster a collaborative learning culture within schools and school boards by building capacity for the skills and approaches that contribute to shared learning and professional dialogue. A number of current provincial initiatives have a mentoring and/or coaching component (e.g., mentoring for literacy coaches, mentoring for student success leaders and the mentoring component of the New Teacher Induction Program (NTIP). An additional
mentoring support for some secondary newly appointed school leaders is through the Student Success/Learning to 18 – School Support Initiative. This initiative offers differentiated support to some school boards and is targeted to schools where support for the principal as the instructional leader will lead to better outcomes – graduation from high school – for students who are capable of graduating, but not on track to do so. The principals of these selected schools are supported by a former secondary school administrator who will coach and guide them through the implementation of the initiative and support the focus on closing the gaps and improving student achievement.

Board leads and steering committees are encouraged to consider mentoring resources and opportunities from one initiative that could be used to support others. Examples in which there may be a collaboration of efforts within schools and boards may include:

- Joint mentor training or workshops on specific issues such as teacher performance appraisal (TPA) to NTIP teacher mentors, literacy and numeracy coaches, principal mentors, and others as appropriate

- Inviting others who work directly with new or experienced teachers over the course of a day, week, month or year to participate in NTIP mentor training and/or principal mentor training to learn complementary skills, approaches and develop a common language

- Encouraging school leader mentors and mentees to work with teacher mentors or coaches to share their knowledge of a range of mentoring approaches with other staff, and guide them in adopting these approaches when working with students, parents and each other

- Supporting superintendents in applying mentoring skills when collaborating with principals as part of the principal/vice-principal performance appraisal process (PPA)

- Equipping all principals with mentoring skills to support teacher and vice principal professional growth and learning as part of the teacher performance appraisal (TPA) and principal/vice-principal performance appraisal

### 2.3 Mentoring Approaches

Mentoring is an iterative process and is modified to meet the changing needs of the newly appointed school leader. The following possible approaches are intended to assist boards as they implement mentoring for newly appointed school leaders.
**Mentoring** usually refers to non-evaluative relationships over time between a newer and a more experienced professional and is often offered to an individual who is new to a position. The focus is the professional learning needs of the less experienced person. The mentor uses questioning and feedback techniques in the context of a trusting relationship and a Learning Plan developed by the mentor and mentee together.

**Coaching** is usually a short term relationship, involving conversations that support job-embedded learning. The goal is largely set by the person being coached and typically has specific outcomes such as enhancing performance, reflecting on practice, or examining and solving a problem.

**Consulting** involves one or more individuals who provide expert information, resources, and guidance to others based on the specific knowledge or skills of the consultant(s).

**Collaborating** is the equitable and collegial process of working together to identify and achieve goals.

**Facilitation** processes strategically support groups to achieve their goals.

It is important that the mentor and mentee establish protocols for confidentiality and for working together at the beginning of the mentoring process. Throughout the mentoring process, mentors who have learned the necessary skills will be able to adopt a range of approaches in response to individual mentee situations, learning needs and contexts. For example, a mentor may at times provide expertise (consult), at other times co-plan with the mentee (collaborate) and at other times support the mentee to reflect on and refine their skills (coach).

Mentoring is enhanced by a menu of other professional learning opportunities on topics of need and interest that can be experienced either by mentees on their own or with their mentors. Mutual learning opportunities for mentors and mentees help to provide focus for the mentoring process. Mentors are encouraged to refer to the Conversation Starters and Sample Learning Plans as a resource. The Ministry of Education’s *Ideas into Action* and *In Conversation* papers can also be used as helpful reference material. These materials are available on the Ministry of Education’s website at [www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership).
3. Requirements

3.1 Overview

In 2010–11 school boards receive one funding allocation for the implementation of a Board Leadership Development Strategy (BLDS). As part of the BLDS, boards will provide mentoring to every newly appointed principal and vice-principal in their first and second years in the role. Funding includes a base allocation and a proportional amount based on the number of administrators, including vice-principals, principals, supervisory officers and the director of education in the board. Boards are expected to meet the following mentoring requirements in order to receive this funding as part of the BLDS in 2010–11.

Each board will have an implementation plan in place, based on the Mentoring for Newly Appointed School Leaders Implementation Continuum provided in Appendix B of this manual that includes the following minimum requirements:

- Provide mentoring to all eligible newly appointed school leaders
- Include the mentoring lead as a member of the Board Leadership Development Strategy (BLDS) steering committee
- Identify at least one mentoring goal that aligns with the Board Strategic Plan and/or the Board Improvement Plan for Student Achievement
- Establish operational parameters
- Recruit and select mentors
- Establish a transparent mentor/mentee matching process
- Establish and communicate roles and responsibilities of the mentor and mentee
- Develop a process for the initial and ongoing assessment of mentee learning needs
- Provide a joint mentor/mentee orientation
- Provide high quality mentor training
- Offer ongoing professional learning and resources to mentors and mentees
- Develop a learning plan require that mentors and mentees use this document to focus the mentoring interactions
- Provide an exit process
- Conduct ongoing monitoring and evaluation of the board mentoring program
- Meet all ministry reporting requirements as outlined in Section 4 of this manual

In particular, high quality mentor training and the use of a shared learning plan that identifies key times mentors and mentees connect as well as learning goals and objectives are critical components to a successful mentoring program.
Boards have the flexibility to customize the mentoring requirements outlined in this manual to reflect local circumstances. They may also establish additional requirements that reflect their unique needs.

### 3.2 Eligible Newly Appointed School Leaders

Mentoring is designed for all newly appointed principals and vice-principals in their first and second years in the role. This includes principals and vice-principals who have teaching responsibilities and, at the board’s discretion, those who are in acting positions. Newly appointed principals who received mentoring in their role as a vice-principal are eligible to receive mentoring again in their first and second years as a principal.

### 3.3 Identification of Mentoring Goals

The Board Leadership Development Strategy (BLDS) will include one clearly articulated goal related to mentoring for newly appointed school leaders which links with the Board Strategic Plan and/or the Board Improvement Plan for Student Achievement. Refer to the Board Leadership Development Strategy Requirements Manual (2010-11), including the Board Leadership Development Planning Template and Implementation Continuum available at www.ontario.ca/eduleadership for more information.

**Effective Practice**

Refer to the ministry’s leadership website for additional resources to guide the planning, implementation and monitoring of mentoring: http://www.ontario.ca/eduleadership.

Further resources, workshops and programs are also available through the Ontario Principals’ Council (OPC), the Catholic Principals’ Council of Ontario (CPCO), and the Association des directions et directions adjointes des écoles franco-ontariennes (ADFO).
3.4 Establishing Operational Parameters

In order to meet the requirements set out in this manual, the mentoring lead and/or steering committee will establish local operational parameters for mentoring, taking into account local circumstances such as geography, demographics, number of newly appointed school leaders, and the number of mentors available. The operational parameters will include:

- One-to-one and/or group mentoring and/or whole group mentoring. It is recommended that a combination of mentoring models be considered to enhance mentoring networks.
- The frequency and nature of contact between mentors and mentees. The board will set a minimum number of face to face contact hours (e.g. at least one form of contact per month).

Effective Practice

Examples of approaches that boards may take to develop goals:

- Identify mentoring as a strategy to support the SMART goals outlined in their Board Improvement Plan for Student Achievement (e.g., articulating and sharing a clear vision for closing student achievement gaps).
- Within the domains of the Ontario Leadership Framework (OLF), emphasize the five Core Leadership Capacities as a focus of capacity building among newly appointed school leaders through their participation in mentoring (e.g., Developing Expertise in Using Data: Gathering, Analyzing and Making Decisions).
- Develop a goal to establish and/or foster a collaborative mentoring culture within the board by making connections between a range of mentoring and/or coaching approaches within the board (e.g., mentor teachers work with principal mentors to apply collaborative skills when working with peers in a professional learning community).
- Mentoring interactions that will take place during and adjacent to district scheduled administrator activities (e.g. monthly administrator meetings)
- Provisions for supply coverage and travel costs for participants
- Distance supports to address geographic constraints, considering the use of technology (e.g. SharePoint, Adobe Connect, web conferences)

3.5 Mentoring Lead and Board Leadership Development Strategy (BLDS) Steering Committee

The director of education or designate will identify a mentoring lead to serve as a member of the Board Leadership Development Strategy (BLDS) Steering Committee and to oversee the planning, implementation and monitoring of mentoring. The board may choose to create a mentoring sub-committee to support the lead in identifying goals and developing the board’s mentoring implementation plan. Refer to the Board Leadership Development Strategy Requirements Manual (2010-11), including the Board Leadership Development Planning Template and Implementation Continuum available at www.ontario.ca/eduleadership for more information.

Effective Practice

In 2010-11 school boards are required to implement mentoring in the context of the Board Leadership Development Strategy (BLDS). There are many ways in which mentoring can enhance the BLDS for example, communicating to aspiring leaders that mentoring is a key support that will be available to them as they enter the new leadership role. In addition, the board may invite mentees to speak with aspiring leaders about their experience and how the mentoring process has helped their transition to the role.
3.6 Recruiting and Selecting Mentors

A process for recruitment and selection of mentors that meets the unique needs of the board and its mentees will be established by the mentoring lead, in consultation with the steering committee. Clear selection criteria will increase the chances for recruiting the best possible mentors. The lead and/or steering committee will identify whether to recruit practicing and/or retired school leaders as mentors.

The process also lays the foundation for the subsequent mentor and mentee matching process. The mentor must not be in a supervisory role to the mentee. The purpose of mentoring is to identify an experienced mentor that the mentee can confide in and not feel vulnerable to in a supervisory sense. It is important to note that all supervisors are expected to provide guidance as part of their supervisory role; ideally using the mentoring approaches outlined in Section 2.3 for those they are responsible for supervising. Mentoring for newly appointed school leaders provides additional support that is non-evaluative for those beginning in the role.

Mentors should:
- be reflective, innovative and forward-looking leaders who are focused on student achievement and well-being;
- be accessible and willing to serve as a continual resource for a minimum of one year and up to two years;
- be committed to gaining the specific skills through quality certified training such as cognitive coaching, blended coaching and mentor training, as well as mentoring web casts and web conferences offered through the three principal associations;
- have a minimum of three years experience as a principal or vice-principal, where possible;
- be a role model for effective school leadership, demonstrating the practices and competencies outlined in the Ontario Leadership Framework;
- understand current education system priorities and initiatives;
- have experience working with adult learning styles;
- be compassionate, supportive individuals who are able to cultivate a learning environment;
- be able to communicate, to listen actively and to provide constructive feedback;
- be skilled in problem solving, planning and goal setting;
- be open to the views and feedback of others and be a life-long learner.
3.7 Matching Mentors and Mentees

A process for matching mentors and mentees is a critical component of mentoring implementation. The mentor and mentee must be able to work together in a professional and collaborative manner that is based on trust, respect and confidentiality and is conducive to learning, ideally for a period of up to two years. The mentees should have the opportunity to provide input into the selection of their mentor. The matching process should include the use of a matching profile for mentors and mentees. This profile should include school context (e.g., urban/rural/elementary/secondary), and their current knowledge and experience and strengths and areas of growth based on the domains, practices and competencies from the Ontario Leadership Framework. The profile information will enable the mentoring lead/steering committee to match the expertise of the mentor to the learning needs of the mentee.

3.8 Roles and Responsibilities of Mentors and Mentees

Mentoring is an iterative process and is modified to meet the changing needs of the newly appointed school leader. The following chart outlines generic responsibilities, provides a short description of the role of the mentor and mentee and outlines the timelines and format for the mentoring process.

<table>
<thead>
<tr>
<th>Role Description</th>
<th>Mentor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Experienced principal or vice-principal (practicing or retired) who:</td>
<td></td>
</tr>
<tr>
<td>• is not a supervisor to the mentee</td>
<td></td>
</tr>
<tr>
<td>• has been carefully selected based on criteria, and</td>
<td></td>
</tr>
<tr>
<td>• has received quality training to prepare for the role</td>
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<table>
<thead>
<tr>
<th>Mentee</th>
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<tbody>
<tr>
<td>Newly appointed principal or vice principal within his or her first and second years of practice. See Section 3.2 for eligibility details</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Responsibility</th>
<th>Mentor</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the context of a learning plan, provide mentoring that focuses in a collaborative manner on both adaptive and technical aspects of the leadership role (e.g. transition to the role, building leadership practice, implementing key</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Mentee</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the context of a learning plan/participate with the mentor in a collaborative manner to learn adaptive and technical aspects of the leadership role (e.g. transition to the role, building leadership practice, implementing key</td>
</tr>
<tr>
<td>Timelines</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>Format</td>
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<td></td>
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</tbody>
</table>

The director of education, mentoring lead, Board Leadership Development steering committee, mentors and mentees each play a key role. The ministry’s Leadership Development Branch and Field Services Branch Regional Offices, in partnership with the French Language Education Policy and Programs Branch, Literacy and Numeracy Secretariat, Student Success/Learning to 18 Branch, Teaching Policy and Standards Branch and others will work together and with boards and stakeholders ensure the successful implementation of mentoring.

### 3.9 Initial and Ongoing Assessment of Mentee Learning Needs

Boards will develop a process for initial and ongoing assessment of mentee learning needs, using tools which will both assess initial mentee learning needs to inform matching as well as ongoing learning assessments that will provide focus and guide the mentoring process.
3.10 Joint Orientation

The board will ensure that mentees receive an orientation to mentoring that includes a discussion of the role of the mentor and what the mentee can expect of the mentor. Joint orientation of mentors and mentees is recommended. Orientation is a process that begins with the first meeting of the mentor and mentee and continues until both partners have clarity about expectations held for the mentoring that will follow.

Establishing trust and confidentiality is a crucial first step that can begin during orientation. First meetings can take place one-to-one or where possible arranged in a small group setting of mentors and mentees or a combination of both. Small group collaboration can enrich the conversation and promote the establishment of a learning network beyond individual mentor and mentee pairs. The orientation process launches the mentor and mentee partnership and provides the foundation for a program of ongoing professional learning.

Effective Practice

- Use a preliminary needs assessment to inform the match between the mentor and mentee, based on the domains, practices and competencies derived from the Ontario Leadership Framework (OLF).

- Mentors and mentees conduct an in-depth assessment of learning needs at the beginning of their mentoring relationship, as a basis for the mentee Learning Plan and to inform the focus of their mentoring work (e.g., with a focus on the five core leadership capacities).

- Mentee learning needs are revisited on an ongoing basis during the two years of mentoring.
3.11 Mentor Training

Preparing mentors for their role is a foundational factor for mentoring success. Mentors require high-quality, specific training (e.g.; certified, accredited) and must have particular skills to be effective (e.g. skillful listening and coaching conversation skills). Boards will provide resources and training by certified trainers to mentors before mentoring begins, and as necessary on an ongoing basis. Mentor training should be combined with training for others involved in mentoring/coaching in the board (e.g. teacher mentors, literacy coaches, student success leader mentors and/or peer mentors/coaches). Topics may include:

- mentoring, goals and implementation parameters within the context of the Board Leadership Development Strategy;
- expectations of the mentor in terms of their participation and their work with the mentee;
- relationship building, collaboration, team work as an initial focus of mentoring;
- the mentoring relationship, and ways in which coaching is part of mentoring;
- mentoring and coaching skills (boards may provide more in-depth mentor training and/or have mentors participate in programs offered by OPC, CPCO, ADFO);
- developing an in-depth understanding of the Board Improvement Plan for Student Achievement and the role of the newly appointed school leader in implementing key priorities;
- guiding mentees to identify their learning needs and develop a learning plan, in the context of board goals for mentoring and the Ontario Leadership Framework.

The use of technologies such as SharePoint, Adobe Connect, podcasts, and web conferences are an effective way for boards to share information or engage in training, and for mentors and mentees to connect from a distance.

3.12 Ongoing Professional Learning and Resources

Ongoing professional learning opportunities reflective of current research and school, board and provincial priorities should be offered to mentors and mentees both individually and as a mentoring team. The professional learning should be designed to both enhance the mentee growth and development as well as the mentor’s learning experience.
3.13 Supporting Mentee Learning Plans

School boards must develop a learning plan and require that mentors and mentees use this document to focus the mentoring interactions on growth and development of the mentee.

One of the first things the mentor and mentee will do together is develop this learning plan to guide the mentoring process. A sample template is provided in Appendix A and is based on the Annual Growth Plan (AGP) template provided as part of the principal/vice-principal performance appraisal (PPA) process. As the intent of the learning plan is to be confidential, a specific mentoring section has been added to the template to be used within the mentoring context.

The plan will reflect the learning needs of the mentee, identified through the learning assessment and will become the focus of work between the mentor and mentee. Mentees are encouraged to use the areas for growth, strategies/supports and target dates identified in their PPA Annual Growth Plan (AGP) as a basis for informing their mentoring learning plan. The Learning Plan, within the context of mentoring, remains confidential between the mentor and the mentee and is not signed by the supervisor. The mentor and mentee will review the plan on a regular basis to determine progress and identify any change in learning needs and interests of the mentee. The Annual Growth Plan (AGP), within the context of PPA, must be signed by the supervisor.
3.14 Exit Process

The board will establish an exit process for re-matching the mentee with another mentor, should the original match be unsuccessful. This will be done in a way that protects the integrity of the individuals involved. The exit process will be made clear to all mentors and mentees during orientation. In cases where the mentor and mentee agree that two full years of mentoring is not required, the board has the discretion to discontinue support before two years are complete.

3.15 Monitoring and Evaluation

The board is responsible for monitoring and evaluating on an ongoing basis to determine whether mentoring is meeting the needs of newly appointed principals and vice-principals, and achieving its intended goals. The board can then identify barriers and issues and take quick action to address challenges and make adjustments as needed. The results of the monitoring and evaluation may be used to inform the reports the board is required to submit to the ministry. The ministry may also evaluate or engage external evaluators to assess the impact of the program and experience on mentors, mentees and the mentoring lead.

The ministry will continue to monitor the provincial implementation of mentoring to ensure boards are meeting the minimum requirements as outlined in section 3 of this requirements manual. Program monitoring in 2010-11 will include a greater focus on the board’s provision of high quality mentor training and the interaction between mentors and mentees through the use of a shared learning plan (see sections 3.11 and 3.13).
4. Responsibilities, Eligible Expenses, and Reporting

4.1 Responsibilities

The following chart provides an overview of specific roles, and reporting responsibilities.

√ = final approval (required)
X = consultation and development (suggested)
M = Mentee
MR = Mentor
SC = Steering committee
ML = Mentoring lead
SO = Designated BLDS Superintendent
DE = Director of Education

<table>
<thead>
<tr>
<th>Activity / Report</th>
<th>School</th>
<th>Board</th>
</tr>
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<tbody>
<tr>
<td>Identify mentoring lead as a member of the Board Leadership Strategy Steering Committee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identify goals for mentoring and develop implementation parameters</td>
<td></td>
<td>X X X X</td>
</tr>
<tr>
<td>Recruitment and selection of mentors</td>
<td></td>
<td>X X X X</td>
</tr>
<tr>
<td>Mentor/ mentee matching</td>
<td></td>
<td>X X X X X</td>
</tr>
<tr>
<td>Initial and ongoing assessment of mentee needs</td>
<td></td>
<td>X X</td>
</tr>
<tr>
<td>Orientation of mentees</td>
<td></td>
<td>X X X</td>
</tr>
<tr>
<td>Mentor training</td>
<td></td>
<td>X X X X</td>
</tr>
<tr>
<td>Ongoing professional learning and resources</td>
<td></td>
<td>X X X X X X</td>
</tr>
<tr>
<td>Require and support mentoring learning plans</td>
<td></td>
<td>√ X X X</td>
</tr>
</tbody>
</table>
4.2 Eligible Expenses

Eligible expenditures include:

- Implementation planning and goal-setting for mentoring (e.g. participation in training, purchase of books or other resources, seeking consulting services from OPC, CPCO, ADFO)

- Training and preparation of mentors (e.g. training provided by the board, attending external professional training, or bringing an external expert into the board to provide training)

- Orientation of mentees (e.g. provided by the board and/or participating with mentors in external professional training)

- Purchase and/or development of resources (e.g. development of a board resource, purchase of external resources)

- Supply coverage to participate in mentoring, attend training, and/or board workshops

- Meeting costs of mentors and mentees, including travel and accommodations, in accordance with the Ontario Management Board of Cabinet Travel, Meal and Hospitality Expense Directive

- Program coordination and planning
• Costs associated with monitoring and evaluation

**Ineligible expenses include:**

• Capital expenditures (e.g. furniture and equipment)

• Staff / support staff not related to mentoring (e.g. educational assistants or school office administrative support)

• Resources for students (e.g. textbooks and classroom materials)

Provisions for unused funds will be determined at the end of each year.

### 4.3 Reporting Requirements

Boards are responsible for reporting at two points in the year for 2010-11. These reports are submitted as part of the reporting requirements for the Board Leadership Development Strategy (BLDS). Refer to the *Board Leadership Development Planning Template and Implementation Continuum* and *Mentoring Implementation Continuum*, found in Appendix C and D of the *Board Leadership Development Strategy Requirements Manual (2010-11)*, available at [www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership) for more information.

1. Mentoring related elements of the BLD Planning Template, including Plans for Training, and Mentoring for Newly Appointed School Leaders Implementation Continuum – October 29, 2010

Appendix A - ALIGNING RESOURCES - SAMPLE MENTORING LEARNING PLAN / PPA ANNUAL GROWTH PLAN

This template is derived from the Principal Performance Appraisal (PPA) Growth Plan template and can be used in the Mentoring context. When used in the context of PPA as an Annual Growth Plan, it must be signed by a supervisor. In the context of Mentoring it remains confidential between the mentor and the mentee.
Appendix A - ALIGNING RESOURCES - SAMPLE MENTORING LEARNING PLAN / PPA ANNUAL GROWTH PLAN

Appraiser: Ms Khan  Appraisee: Mr Peters

This template is derived from the Principal Performance Appraisal (PPA) Growth Plan template and can be used in the Mentoring context. When used in the context of PPA as an Annual Growth Plan, it must be signed by a supervisor. In the context of Mentoring it remains confidential between the mentor and the mentee.

Areas for Growth
- Gain an understanding of different ways in which to designate budget priorities
- Explore program areas requiring financial support
- Work collaboratively with staff and school council to facilitate alignment of resources
- Align budget requests with school priorities

Growth Strategies / Supports (Ways of Acquiring Skills) Follow-up if required
- Attend board sponsored workshops
- Work with senior management staff and experienced school leaders in order to gain a better understanding of budgets
- Work with mentor to get tips and strategies on ways to align budget

Target Dates for Completion
- Fall
- Winter
- Ongoing, regular intervals

Suggested Annual Growth Plan for next year

Leader Practices
- Leading the Instructional Program
  - Ensures that learning is at the centre of planning and resource management
  - Securing Accountability
  - Supports the school council so it can participate actively and authentically in its advisory role

Leader Competencies
- Knowledge
  - Accountability framework, including self-evaluation
  - Attitudes
  - Commitment to individual, team and whole-school accountability for student outcomes

Ongoing Professional Development
- Board sponsored workshops
- Networking with senior management, supervisory officers and colleagues
- School Outside in Ontario Schools Conference 2010

System Practices and Procedures
- Parent and Community Supports
  - The board provides training for school council chairs

Specific Focus Areas of Growth (Learning Goals) for Mentoring (these do not need to be shared with supervisor)

Mentee: Mr Peters  Mentor: Ms LeBlanc

Date(s) developed: 2010 - 06 - 19
Contact Consideration: out of office
Meeting Frequency: 1st Tuesday of each month
Meeting Location: YMCA meeting room

2. Aligning Resources
   Technical goal: Learn budget requirements and technical skills to manage school and school council budgets
   Adaptive goal: Develop skills of allocation of above budgets to school priorities through a collaborative process

Growth Strategies as a focus of Mentoring

<table>
<thead>
<tr>
<th>Growth Strategies as a focus of Mentoring</th>
<th>Dates and timelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Participate in board sponsored workshop “Financial Management for New School and System Leaders”</td>
<td>September 2010</td>
</tr>
<tr>
<td>2. Mentor to participate in school budget meeting at mentee’s school to observe process of decision making and alignment with board priorities, and provide feedback and suggestions</td>
<td>September 2010</td>
</tr>
<tr>
<td>3. Work with mentor and financial services staff on: school budget - consult school council re. budget for outreach money</td>
<td>October 2010</td>
</tr>
<tr>
<td>4. Facilitate budget planning meeting with staff advisory council - plan and discuss with mentor. Review school district priorities and the school improvement plan to inform the process</td>
<td>October 2010</td>
</tr>
<tr>
<td>5. Participate in board sponsored workshop “Leading the Instructional Program”</td>
<td>October 2010</td>
</tr>
<tr>
<td>6. Facilitate budget planning meeting with school council - plan and reflect with mentor</td>
<td>October 2010</td>
</tr>
</tbody>
</table>

Resources:
- Ontario Leadership Framework: Board Improvement Plan: School Improvement Plan
- Board Financial Handbook for Principals
- BAS 2000 Software (software used to manage school and board budgets)
## Appendix B: Mentoring for Newly Appointed School Leaders – Implementation Continuum

<table>
<thead>
<tr>
<th>Indicators</th>
<th>Implementation</th>
<th>Building Capacity</th>
<th>Sustaining Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Role of Mentoring Lead</strong></td>
<td><strong>Lead:</strong></td>
<td><strong>Lead:</strong></td>
<td><strong>Lead:</strong></td>
</tr>
<tr>
<td>Mentoring lead is identified by the Director of Education and informed of his/her role and responsibilities as a member of the Board Leadership Development Strategy (BLDS) Steering Committee. The actions of the lead are supported by the BLDS Steering Committee. The roles of Board Leadership Development Strategy Lead and the mentoring lead can be administered by the same person.</td>
<td>receives certified Mentor training (required)</td>
<td>ensures that the mentoring requirements are met through the monitoring process and revised as needed to best meet local needs and circumstances, and in accordance with the <em>Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)</em></td>
<td>makes enhancements to mentoring based on monitoring and evaluation results, and in accordance with provincial requirements set out in the <em>Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)</em></td>
</tr>
</tbody>
</table>

### Lead:

- receives certified Mentor training (required)
- acquires a comprehensive understanding of how the Ontario Leadership Framework (OLF) supports mentoring
- ensures that the board meets all requirements set out in the *Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)*
- facilitates mentoring relationships within the boards and serves as liaison between mentors and mentees
- provides the necessary supports to mentors and mentees (e.g. resources, examples of learning plan templates)
- makes connections between mentoring and the Board Leadership Development Strategy (BLDS)

### Lead:

- provides ongoing support to mentees and mentors
- connects with leads in other boards to share effective practices and learn together about improving mentoring
- strengthens connections between Mentoring and the Board Leadership Development Strategy (BLDS)
- makes connections between mentoring for newly appointed school leaders with other mentoring/coaching activities in the school board (e.g. NTIP, School Support Initiative)

### Lead:

- provides continuous support to mentees and mentors addressing specific needs as they arise
- enhances connections with leads in other boards to share effective practices and learn together about improving mentoring
- takes a system perspective on ongoing implementation and alignment of mentoring with other board and ministry initiatives
- embeds mentoring as an integral component of the Board Leadership Development Strategy (BLDS)
2. Identification of Mentoring Goals

Mentoring is a key support for newly appointed school leaders which helps to attract the right people to the role. One clearly articulated mentoring goal which links with board improvement goals is developed for the Board Leadership Development Strategy. Refer to the Board Leadership Development Strategy Requirements Manual (2010-11), including the Board Leadership Development Planning Template and Implementation Continuum available at www.ontario.ca/eduleadership for more information.

<table>
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<tbody>
<tr>
<td>—</td>
<td></td>
<td></td>
<td>makes connections between Mentoring for newly appointed school leaders and other mentoring/coaching activities in the school board (e.g. NTIP, School Support Initiative) are established and refined as appropriate</td>
</tr>
<tr>
<td>Lead:</td>
<td>identifies and communicates Board Mentoring goals that are specifically linked with the Board Strategic Plan and Board Improvement Plan for Student Achievement</td>
<td>monitors and evaluates the extent to which mentoring goals are being met, and continue to meet the needs of the Board Strategic Plan and the Board Improvement Plan for Student Achievement</td>
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<tr>
<td></td>
<td>refines board mentoring goals, based on monitoring and evaluation results, enhances orientation and preparation of mentors and mentees by communicating linkages between mentoring, the Board Leadership Development Strategy and ministry initiatives critical to newly appointed school leaders</td>
<td>refines board mentoring goals, based on monitoring and evaluation results, on a continual basis includes a standard practice of communicating linkages between mentoring, the Board Leadership Development Strategy and ministry initiatives critical to newly appointed school leaders, as part of the orientation and preparation of mentors and mentees</td>
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</table>
### Mentoring for Newly Appointed School Leaders Implementation Continuum

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</thead>
<tbody>
<tr>
<td><strong>3. Establishing Operational Parameters</strong>&lt;br&gt;Establish operational parameters that support Mentoring and meet provincial requirements as set out in the Mentoring for Newly Appointed School Leaders Requirements Manual (2010-11)&lt;br&gt;Parameters include:&lt;br&gt;- Identification of the frequency and nature of contact between mentors and mentees&lt;br&gt;- Scheduling and facilitation of mentoring interactions that will take place during and adjacent to district scheduled administrator activities&lt;br&gt;- Provides distance supports to address geographic constraints, considering the use of technology (e.g. SharePoint, Adobe Connect, web conferences)&lt;br&gt;Lead: establishes the local operational parameters for mentoring, taking into account local circumstances such as geography, demographics, number of newly appointed school leaders, and the number of mentors available.&lt;br&gt;- ensures that a minimum number of face to face contact hours is established and communicated to all participants&lt;br&gt;- establishes and communicates guidelines for supply coverage and travel costs for mentors and mentees</td>
<td>Lead: monitors and evaluates the extent to which the operation parameters as outlined in the Mentoring for Newly Appointed School Leader Requirements Manual (2010-11) are being met&lt;br&gt;- reviews and refines operational parameters</td>
<td>Lead: refines board operational parameters as outlined in the Mentoring for Newly Appointed School Leader Requirements Manual (2010-11) based on monitoring and evaluation results, on a continual basis</td>
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## Mentoring for Newly Appointed School Leaders Implementation Continuum

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</thead>
<tbody>
<tr>
<td><strong>4. Recruiting/Selecting Mentors</strong></td>
<td>Lead: establishes criteria and a clear process for the recruitment and selection of mentors who meet the needs of the board and its mentees</td>
<td>Lead: refines the recruitment and selection process, taking into account feedback from mentors and mentees</td>
<td>Lead: develops a process for ongoing recruitment and selection of mentors and annually reviews and improves the selection process to best meet the needs of mentees, and to encourage experienced administrators to become mentors</td>
</tr>
<tr>
<td>A clear selection process which include criteria for recruiting effective mentors. The mentor must not be in a supervisory role to the mentee. Practicing or retired school leaders may serve as mentors. Mentors should be reflective, innovative leaders with a minimum of three years experience as a principal or vice principal. Mentors should have experience working with different adult learning styles, and demonstrate the potential to learn the necessary skills and strategies for mentoring.</td>
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</tr>
<tr>
<td><strong>5. Matching Mentors/Mentees</strong></td>
<td>Lead: establishes and puts in place an organized and timely process for the matching of mentors with newly appointed principals and vice-principals identifies tools to facilitate the matching process (e.g. Self-assessment tools, mentor/</td>
<td>Lead: reviews and revises the matching process and tools in response to feedback from mentors and mentees</td>
<td>Lead: reviews and revises the matching process and tools used to assess the needs of mentees and mentors makes adjustments as needed to address changes in learning needs of mentees and overall needs of the board</td>
</tr>
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</table>
### Mentoring for Newly Appointed School Leaders Implementation Continuum

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>matching form for mentors to complete outlining their knowledge and experience relating to the domains of the Ontario Leadership Framework (OLF).</td>
<td>mentee profiles) • facilitates the matching process, including input from the mentees and mentors and considering the individual needs of mentees (e.g., invite mentors/mentees to identify their strengths and needs) using the OLF as a resource</td>
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</table>

#### 6. Roles and Responsibilities of Mentors and Mentees

Mentoring is an iterative process and is modified to meet the changing needs of the newly appointed school leader.

The Mentor is responsible for providing mentoring that focuses on both adaptive and technical aspects of the leadership role.

The Mentee is responsible for participating with the mentor in a collaborative manner to learn adaptive and technical aspects of the leadership role.

<table>
<thead>
<tr>
<th>Mentors and mentees:</th>
<th>Mentors and mentees:</th>
<th>Mentors and mentees:</th>
<th>Mentors and mentees:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• have a clear understanding of their roles and the expectations of mentoring within the board</td>
<td>• refine their focus of mentoring considering both the technical and adaptive aspects of the leadership role (e.g., transition to the role, building leadership practice, implementing key initiatives)</td>
<td>• commit to a long-term, sustained mentoring process for a period of up to two years, using a range of mentoring approaches</td>
<td>• review and refine their focus on practices and competencies outlined in the OLF through participation in mentoring</td>
</tr>
<tr>
<td>• demonstrate an understanding of effective leadership practices and competencies as outlined in the Ontario Leadership Framework (OLF)</td>
<td>• continue to document learning goals and progress through the use of a learning plan</td>
<td>• provide ongoing feedback to enhance mentoring implementation as part of board monitoring and evaluation strategy</td>
<td>• identify areas of focus for the first year of mentoring, through the use of a learning plan (may begin with a focus on technical aspects of the leadership role through his/her interaction with mentor)</td>
</tr>
<tr>
<td>• identify areas of focus for the first year of mentoring, through the use of a learning plan (may begin with a focus on technical aspects of the leadership role through his/her interaction with mentor)</td>
<td>• adopt new practices and competencies from the OLF as they progress through the mentoring relationship</td>
<td></td>
<td>• demonstrate knowledge of various mentoring approaches learned from each other through their interactions and</td>
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</table>
### Mentoring for Newly Appointed School Leaders Implementation Continuum

<table>
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<tr>
<th>Indicators</th>
<th>Implementation</th>
<th>Building Capacity</th>
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</thead>
</table>
| relationship building | Mentors:  
• understand a variety of mentoring approaches, and how to apply them in various circumstances  
• reflect upon their own practices as a school leader to help inform the mentoring process | | |

#### 7. Initial and Ongoing Assessment of Mentee Learning Needs

**Boards support mentees in assessing their learning needs.**

**Learning assessment guides the work of the mentor and mentee.**

**Use a needs assessment tool to inform the match between the mentor and mentee. In-depth learning assessments are used to focus the mentoring work. Learning needs are re-assessed on an ongoing basis.**

| Lead: | Mentors:  
• establishes a process and identifies and shares tools that can be used to assess mentee learning needs (e.g. preliminary learning assessment to inform matching and in-depth learning assessment when mentoring begins) and guide the mentoring process | Mentors:  
• work with mentees to identify needs and interests | Mentors:  
• work with mentees to assess learning needs on an ongoing basis and revise focus based on shifting needs and interests |
<table>
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</thead>
<tbody>
<tr>
<td>establishes a process and identifies and shares tools that can be used to assess mentee learning needs (e.g. preliminary learning assessment to inform matching and in-depth learning assessment when mentoring begins) and guide the mentoring process</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>work with mentees to identify needs and interests</td>
<td></td>
<td></td>
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</table>

**Lead:**

• monitors activity to ensure that ongoing assessments are being used to guide the mentoring process

**Mentors:**

• work with mentees to assess learning needs on an ongoing basis and revise focus based on shifting needs and interests

**Lead:**

• continues to seek out effective learning assessment tools and build these into mentoring process

• revisits the learning needs assessment tools and timelines as needed to best guide the mentoring process

• continues to monitor activity to ensure that ongoing assessments are being used to guide the mentoring process

**Mentors:**

• work with mentees to assess learning needs on an ongoing basis and revise and refine focus based on shifting needs and interests

• provide ongoing feedback to the mentoring lead about the
| Mentoring for Newly Appointed School Leaders Implementation Continuum |
|-----------------|-----------------|-----------------|-----------------|
| **Indicators** | **Implementation** | **Building Capacity** | **Sustaining Capacity** |
| **8. Joint Orientation** | Lead: develops and provides an orientation process for mentees and mentors and acquires and distributes required resources | Lead: monitors the effectiveness of the orientation process by seeking feedback from mentors and mentees and annually reviews and revises the orientation process for mentees and mentors based on monitoring and evaluation results | Lead: continues to monitor the effectiveness of mentee and mentor orientation and continuously refines the orientation process in order to best meet needs of mentees and mentors based on monitoring and evaluation results |
| Mentoring expectations (role of the mentor and what the mentee can expect of the mentor) are clearly communicated to mentor and mentee. Orientation provides foundation for ongoing professional learning (e.g. building trust, confidentiality, the learning plan, the OLF and exit process). | **Lead:** | **Lead:** | **Lead:** |
| **9. Training of Mentors** | Lead: must ensure that every mentor receives certified training that focuses on the mentoring approaches (e.g. coaching, mentoring, consulting, facilitating and collaborating) that is offered through the associations or other providers. | Lead: coordinates certified training (offered by associations or other providers) to experienced mentors to refine and update their skills and provides training that focuses on the specific and changing needs of mentees and aligns training with other mentoring initiatives within the board (e.g. NTIP, SS/L18). | Lead: monitors the effectiveness of training on an ongoing basis and assesses and adapts training to meet specific needs of new and experienced mentors based on monitoring and evaluation results and promotes and facilitates joint training for mentoring across the board in collaboration with NTIP, SS/L18 and LSA and develops a succession plan for new mentors. |
| Every mentor must have high-quality, specific training (e.g.; certified, accredited) before mentoring begins, and on an ongoing basis as necessary to refine and upgrade skills. Training is provided by certified internal or external trainers as offered by principal associations and other providers. |  |  |  |
### 10. Ongoing Professional Learning (PL) and Resources

<table>
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<tr>
<th>Indicators</th>
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</thead>
<tbody>
<tr>
<td><strong>Lead:</strong></td>
<td>arranges ongoing professional learning (PL) for mentees and mentors that is current, research based and reflects school, board and provincial initiatives and priorities.</td>
<td>promotes ongoing PL (e.g. Emotional Intelligence, Conflict Resolution, Teacher Performance Appraisal) coordinates PL for mentees and mentors that is current, research based and reflects school, board and provincial initiatives and priorities and focuses on the changing needs of mentees and mentors (1st and 2nd year)</td>
<td>monitors and modifies PL for mentees and mentors that is current, research based and reflects school, board and provincial initiatives and priorities</td>
</tr>
<tr>
<td></td>
<td>provides supports and resources to mentors and mentees on an ongoing basis in order to enhance the mentees growth and development as well as the mentor's learning experience.</td>
<td>refines supports and resources provided to mentors and mentees on an ongoing basis in order to enhance the mentees growth and development, as well as, the mentor's learning experience and priorities</td>
<td>assesses effectiveness of PL and resources through monitoring and evaluation data and either adapts existing resources or provides new resources based on feedback from mentors/mentees through</td>
</tr>
<tr>
<td></td>
<td>participates in professional learning on an ongoing basis.</td>
<td></td>
<td>aligns PL and mentoring resources, with other mentoring initiatives within the board (e.g. NTIP, SS/L18)</td>
</tr>
</tbody>
</table>

**Mentors, mentees, and the board mentoring lead engage in ongoing professional learning opportunities related to mentoring that are reflective of current research and school, board and provincial priorities.**

Professional learning for mentors and mentees both enhance the mentee growth and development as well as the mentor’s learning experience.

### 11. Supporting Mentee Learning Plans

<table>
<thead>
<tr>
<th>Indicators</th>
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</thead>
<tbody>
<tr>
<td><strong>Lead:</strong></td>
<td>identifies the roles and responsibilities of mentors and mentees in developing and using a learning plan document.</td>
<td>reinforces importance and value of documenting progress towards achieving mentees’ goals in the learning plan document.</td>
<td>assesses use and effectiveness of learning plan document and makes modifications (either to learning plan itself, or by providing additional support to mentors/mentees) based on feedback provided through monitoring and evaluation results.</td>
</tr>
<tr>
<td></td>
<td>explains the purpose and benefits of using the learning plan or log to mentees and mentors.</td>
<td>Mentees and mentors: use the ministry or board-developed learning plan template in order to sharpen their focus, to guide and</td>
<td>Mentees and mentors:</td>
</tr>
<tr>
<td></td>
<td>provides mentees and mentors with the ministry or board-developed learning plan.</td>
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</table>

**Every mentor and mentee must use a learning plan document to guide the mentoring process. The learning plan:**

- is one of the first things the mentor and mentee do to guide the mentoring process
- is used to focus mentoring interactions and growth and
<table>
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</tr>
</thead>
<tbody>
<tr>
<td>Development of the mentor</td>
<td>templates</td>
<td>monitor their growth and progress in achieving identified goals and ensure mentees’ learning needs are being met</td>
<td>refer continually to the learning plan or log and make changes as needed to ensure mentees’ learning needs are being met and that professional growth and development goals are being achieved</td>
</tr>
<tr>
<td>reflects the learning needs of the mentee</td>
<td>• Monitors mentoring activity to ensure that the learning plan document is being used</td>
<td>• review the learning plan document in order to identify changes in learning needs and interests of the mentee</td>
<td></td>
</tr>
<tr>
<td>identified through the learning assessment</td>
<td>• use the ministry or board-developed learning plan in order to guide and monitor their growth and achievement of identified goals in order to ensure mentees’ learning needs are being met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>is reviewed on a regular basis to determine</td>
<td>• refer continually to the learning plan or log and make changes as needed to ensure mentees’ learning needs are being met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>progress and identify changes in learning</td>
<td>• use the ministry or board-developed learning plan in order to guide and monitor their growth and achievement of identified goals in order to ensure mentees’ learning needs are being met</td>
<td></td>
<td></td>
</tr>
<tr>
<td>needs and interests of the mentee</td>
<td>• use the ministry or board-developed learning plan in order to guide and monitor their growth and achievement of identified goals in order to ensure mentees’ learning needs are being met</td>
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12. Exit process

Exit process must be established by board and clearly communicated to mentor and mentee.

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<thead>
<tr>
<th>Lead:</th>
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<tbody>
<tr>
<td>establishes and clearly communicates the exit</td>
<td>• monitors exit process</td>
<td>• revisits the exit process annually and modifies it as needed to ensure efficacy</td>
<td></td>
</tr>
<tr>
<td>process to mentors and mentees</td>
<td>• reviews matching process if necessary</td>
<td>based on feedback provided through monitoring and evaluation results</td>
<td></td>
</tr>
<tr>
<td>provides necessary supports to facilitate the</td>
<td>• revises exit process if necessary</td>
<td>updates the exit process</td>
<td></td>
</tr>
<tr>
<td>exit process to include re-matching if required</td>
<td>• communicates changes to mentors and mentees</td>
<td>communicates and monitors changes to mentors and mentees</td>
<td></td>
</tr>
</tbody>
</table>
### Mentoring for Newly Appointed School Leaders Implementation Continuum

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</thead>
<tbody>
<tr>
<td><strong>13. Monitoring and Evaluation</strong></td>
<td>Lead: • conducts a needs assessment to determine strengths and areas of need</td>
<td>Lead: • conducts data collection activities, reviews results and modifies relevant components of mentoring based on results</td>
<td>Lead: • continues to conduct data collection activities, reviews results, identifies successes and challenges, and modifies relevant components of mentoring based on results</td>
</tr>
<tr>
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<td>• develops a strategy for monitoring and evaluating success and possible areas of improvement in mentoring</td>
<td>• takes an active role in finding solutions to barriers or issues that may arise</td>
<td>• revisits data collection methods to ensure effectiveness and efficiency in obtaining feedback necessary for making improvements in mentoring adjusting goals when required</td>
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<td>• identifies and coordinates the development of a variety of methods and tools (e.g., end of year survey) to gather information to assess the board’s mentoring program and its impact on mentors and mentees</td>
<td>• communicates results of the monitoring and evaluation of the mentoring program to mentors and mentees</td>
<td>• addresses barriers and issues in order to maintain a quality mentoring program</td>
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<td>• establishes indicators of successful implementation of mentoring and the achievement of the board’s mentoring goals and effectiveness of board’s mentoring policies</td>
<td>• communicates board’s monitoring and evaluation strategy based on board’s mentoring goals</td>
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<td>• communicates board’s monitoring and evaluation strategy based on board’s mentoring goals</td>
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Monitoring and evaluation occurs on an ongoing basis to determine if mentoring is meeting mentors’/mentees’ needs and achieving intended goals.

Barriers and issues may be identified and actions to address challenges may be taken by board. Results of monitoring may be used to inform the reports the board is required to submit to the ministry.