School Board Guideline for Implementation of Mentoring for Newly Appointed School Leaders

Reach Every Student: Supporting Effective School Leadership

Ministry of Education
2009-2010
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1. BACKGROUND

1.1 Mentoring\(^1\) for Newly Appointed School Leaders

Mentoring is a cornerstone of the Ontario Leadership Strategy. The Ontario Leadership Strategy is a comprehensive plan of action designed to support student achievement and well-being by attracting and developing skilled and passionate school and system leaders across the province. It delivers on our commitment of ensuring the leadership required to create an education system that is second to none. The Ontario Leadership Strategy is sharply focused on supporting the three core provincial education priorities: high levels of student achievement; reduced gaps in student achievement; and increased public confidence in publicly funded education.

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
- Help principals and vice-principals develop into the best possible instructional leaders

Through Mentoring, newly appointed principals and vice-principals are supported by experienced school leader mentors during their first and second years of practice. Experienced school leaders receive support and resources to become effective mentors, and to continue developing their own leadership competencies. Mentoring takes place through a collaborative process that is focused on the professional learning needs of the newly appointed school leader. It is sponsored by the school board and the Ministry of Education.

1.2 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 the first year of province-wide implementation of Mentoring for School Leaders in 2008-09.

Results of two years of monitoring and evaluation have confirmed multiple benefits of Mentoring among mentors, mentees and the education system. In particular, mentees benefit from support in learning the new leadership role, increased confidence, and opportunities for professional reflection to guide goal-setting and achieve identified goals. Schools, school boards and the ministry benefit from improved performance of new school leaders, increased capacity building across the system, and support for system priorities. Mentoring also provides a tremendous professional development opportunity for experienced

\(\text{\textsuperscript{1}}\) For the purposes of this guideline, coaching is considered an integral part of Mentoring.
school leader mentors. Through their experience and observations, mentor, mentee and school board participants anticipate improvements in the quality of instructional leadership across the system over time as an outcome of Mentoring for Newly Appointed School Leaders.

1.3 About this Guideline

The guideline has been developed to support school boards in their implementation of Mentoring for Newly Appointed School Leaders. It reflects input from our principals’ associations, supervisory officers’ associations, directors’ associations, and teacher federation partners.

The guideline sets out the requirements boards must have in place in order to receive annual ministry funding (Section 3). It also provides effective practices such as an implementation planning template (Appendix C) for school boards to ensure that quality mentoring is taking place.

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 principal associations including:

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

The following website contains links to the guidelines and additional resources: http://www.ontario.ca/eduleadership.

1.4 Mentoring Approaches

What is deemed to constitute Mentoring and what differentiates it from other leadership supports is often a source of debate among experts. The following possible approaches are intended to assist boards as they implement Mentoring. Throughout the mentoring process, mentors that have learned the necessary skills will be able to adopt a range of approaches in response to individual mentee situations, learning needs and contexts.

**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.

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

**Consulting** provides expert information, resources, and guidance or advice to others based on the specific knowledge or skills of the consultant.

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

**Facilitation** processes strategically support groups to achieve their goals.
1.5 Updates and Revisions to this Guideline

Boards began implementation of Mentoring in September 2008 and will continue in September 2009. As the year proceeds, there may be updates to this guideline on a periodic basis. School boards will be advised of changes or additions as they are made. Boards are also advised to check the ministry website for updates and new resources at [http://www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership).

2. MENTORING AND LEADERSHIP

2.1 The Essential Role of School Leaders

School leadership matters. Research shows that leadership is second only to teaching in its impact on student outcomes. The role of principal attracts educators who are passionate about student learning and who want to make a difference in their schools and communities.

Principals and vice-principals have a special responsibility to focus on what it takes to improve student achievement, reduce gaps in student achievement and increase public confidence in publicly funded education, as outlined in the 2008 *Reach Every Student: Energizing Ontario Education* vision paper. School leaders understand and contribute to the implementation of a range of initiatives such as high levels of literacy and numeracy; student success; safe, healthy, and inclusive schools and parent engagement.
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 inspire 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.

2.2 Why Mentoring?

The first two years in a school leadership role are particularly 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 one of the most powerful forms of professional learning that focuses on essential aspects of the new leadership role. 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. At the heart of it, Mentoring provides support tailored to the unique role of newly appointed school leaders so they can be successful in the first stage of their leadership career.

2.3 Context for Mentoring

The Ontario Leadership Strategy

The Ontario Leadership Strategy (OLS) is a comprehensive plan of action designed to support student achievement and well-being by attracting and developing skilled and passionate school and system leaders across the province. It delivers on a provincial commitment of ensuring the leadership required to create an education system that is second to none. The strategy is sharply focused on supporting the three core provincial education priorities: high levels of student achievement; reduced gaps in student achievement; and increased public confidence in publicly funded education.

The strategy incorporates a collaborative approach through which schools, school boards, education partners and the ministry work in partnership to make a difference for every student. It focuses on both individual and system-level development, embedded in daily practice and refined through continuous learning. Mentoring for Newly Appointed School Leaders directly supports the two goals of the strategy, which are to:

- Attract the right people to the principalship
- Help principals and vice-principals develop into the best possible instructional leaders

Mentoring, Principal Performance Appraisal and Succession Planning and Talent Development work together as integral and inter-related components and are a focus of province-wide implementation in
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2009-10. The Ontario Leadership Strategy is grounded in the Ontario Leadership Framework (OLF) and is supported by the five Core Leadership Capacities identified below.

More information on the OLS is provided on the ministry website at http://www.ontario.ca/eduleadership.

The Ontario Leadership Framework

The Ontario Leadership Framework (OLF) identifies effective practices, 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 Ontario Leadership Framework has been adopted by the Institute for Education Leadership (IEL) and embraced by education practitioners across the province. It is composed of two parts:

- Part one identifies leadership practices and competencies that are found through research and professional experience to have a positive impact on student achievement. Leader practices include actions, behaviours and functions while leader competencies include skills, knowledge and attitudes of effective leaders.

- Part two identifies system practices and procedures to support successful school leadership. Directors of education and supervisory officers play an essential role as champions of leadership development by putting in place high-impact supports.

More information about the Ontario Leadership Framework is available at the Institute for Education Leadership (IEL) website at http://www.education-leadership-ontario.ca/resources.shtml. The IEL offers workshops that enable boards to gain a better understanding of the OLF and how it applies in practice.

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2 Ontario’s Institute for Education Leadership is a unique partnership between representatives of Ontario principals’ and supervisory officers’ associations, councils of directors of education, and the Ministry of Education that is committed to exploring leading-edge thinking on education leadership and applying that expertise to the development of high-quality resources and learning opportunities for school, board, and system leaders.
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Five Core Leadership Capacities (CLCs)

The five Core Leadership Capacities (CLCs) are derived from the Ontario Leadership Framework. They have been recognized by research, practitioners and education partners as being critical areas of leadership required for sustained improvement in student achievement and well-being. Strengthening these capacities requires focussed efforts by all partners of the education system. School and system leaders have different levels of expertise at different stages of their careers related to the five CLCs. They use the Ontario Leadership Framework as a resource to identify practices and competencies that will be their focus for building expertise related to the CLCs. This is a dynamic process. As contexts change and expertise grows, leaders identify new areas for development related to the CLCs. In this way, they continuously improve their practice. The five CLCs are:

1. Setting Goals
2. Aligning Resources with Priorities
3. Promoting Collaborative Learning Cultures
4. Using Data
5. Engaging in Courageous Conversations.

Principal and Vice-Principal Performance Appraisal (PPA)

The Principal and Vice-Principal Performance Appraisal (PPA) process provides an opportunity for principals/vice-principals to have meaningful dialogue with their supervisors about performance, identify goals, articulate the supports they require to achieve goals and identify opportunities for professional growth that is focused on improved student achievement.

The mentoring process provides additional support for newly appointed school leaders. In the first year of practice, a newly appointed school leader is required to develop an Annual Growth Plan that is signed by the supervisor. In the second year of practice, the school leader is appraised and is placed in the five-year experienced principal/vice-principal evaluation cycle.

The strengths and areas of professional growth and development identified for the principal/vice-principal through the PPA process, and in particular as outlined in the Annual Growth Plan, can help guide and provide a focus for the mentoring process. Mentees may use their PPA Annual Growth Plan 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.

School boards must identify a Learning Plan template to be used by mentors and mentees within the board. The sample template provided in Appendix D of this guideline is based on the PPA Annual Growth Plan and customized for use within the Mentoring context.

For more information on Principal Performance Appraisal (PPA), refer to the ministry guidelines available at http://www.ontario.ca/eduleadership.

Board Succession and Talent Development Plan

Mentoring can have a significant impact on system development when it is embedded in a board Succession and Talent Development Plan. As part of the Ontario Leadership Strategy, boards are
expected to put such a plan in place in 2009-10. Refer to the Succession Planning and Talent Development: Expectations and Implementation Continuum that was provided by the Ministry in June 2009. A board plan may include strategies for identifying and attracting aspiring leaders, supporting newly appointed leaders, providing ongoing professional development, and benefiting from outgoing knowledge and expertise of experienced principals and vice-principals.

**Effective Practice**

Consider how Mentoring will enhance your board Succession and Talent Development Plan. For example, make plans to communicate to aspiring leaders that Mentoring is a key support that will be available to them as they enter the new leadership role. The board may also invite mentees to speak with aspiring leaders about their experience and how the mentoring process has helped their transition to the role.

**Board Collaborative Learning Culture and Making Connections**

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)). 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:

- Provide 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
- Invite 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
- Encourage 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
- Support superintendents in applying mentoring skills when collaborating with principals as part of the Principal Performance Appraisal process (PPA)
- Equip all principals with mentoring skills to support teacher professional growth and learning as part of the Teacher Performance Appraisal (TPA) process
3. REQUIREMENTS

3.1 Overview

In 2009-10, the ministry will provide funding to boards for Mentoring based on minimum requirements. Boards will have the flexibility to customize specific components to reflect local circumstances such as geography, demographics, number of newly appointed school leaders, and the number of mentors available. They may also establish additional requirements that reflect their unique needs.

The board must have an implementation plan in place that includes the following minimum requirements:

- Offer mentoring to all eligible newly appointed school leaders
- Establish and maintain a school board mentoring lead and steering committee
- Identify goals for mentoring that focus on both individual and system development
- Develop mentoring implementation parameters
- Recruit and select mentors
- Prepare mentors and mentees
- Support initial and ongoing assessment of mentee learning needs
- Match mentors and mentees
- Provide an exit process
- Require that mentors and mentees use a Learning Plan
- Support the mentoring process
- Conduct monitoring and evaluation of board mentoring.

In October 2009, each school board must submit a completed implementation planning template to the ministry (Appendix C), as outlined in Section 6.

Effective Practice

Refer to the following website for additional resources to guide the planning, implementation and monitoring of Mentoring that takes place in the board: [http://www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership).

Further resources, workshops and programs are also available through the Ontario Principals’ Council, the Catholic Principals’ Council of Ontario, and the Association des directions et directions adjointes des écoles franco-ontariennes.

3.2 Eligible Newly Appointed School Leaders

Mentoring is 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 Mentoring Lead and Steering Committee

The director of education or designate must identify a Mentoring lead and steering committee to oversee the planning, implementation and monitoring of Mentoring. The committee is responsible for identifying goals and developing the board’s Mentoring Implementation Plan (see Appendix C for an implementation planning template). Mentoring may be included in the mandate of an existing central board committee.

**Effective Practice**

The Mentoring lead and members of the steering committee are encouraged to access resources and engage in training to support their role. This may include:

- Training focused on the planning and implementation of Mentoring
- Mentor/Coach preparation and training (Section 3.10)

The services of the Ontario Principals’ Council, the Catholic Principals’ Council of Ontario, and the Association des directions et directions adjointes des écoles franco-ontariennes may be engaged to support the steering committee in planning their implementation of Mentoring.
3.4 Mentoring Goals

The board Mentoring Implementation Plan must include clearly articulated goals that link Mentoring with individual and system development. Based on these goals, Mentoring implementation will be monitored by the board to assess effectiveness.

**Effective Practice**
Examples of approaches that boards may take to develop goals:

- Identify two to three goals for strengthening the implementation of Mentoring based on the board’s position on the implementation planning template (e.g., establishing a monitoring and evaluation strategy for the effective implementation of Mentoring)

- Within the domains of the Ontario’s 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)

- Choose a goal to strengthen the board Succession and Talent Development Plan (e.g., encourage aspiring leaders to participate in a mentoring conversation that is aligned with their interests or areas of skill development)

- Identify Mentoring as a strategy that might support your Board Improvement Plan’s SMART goals (e.g., articulating and sharing a clear vision for closing student achievement gaps)

While these goals provide a helpful context and focus for Mentoring across the system, it is important that the mentor and mentee develop the Learning Plan in a way that reflects the individual needs of the mentee and takes into account his or her existing skills, knowledge, and experience. As outlined in Section 3.11, the Learning Plan will be reviewed on an ongoing basis and adjustments made as the mentee grows and his or her learning needs shift over time.

See Appendix C – Implementation Planning Template for further guidance on setting individual and system goals for Mentoring.
3.5 Implementation Parameters

For Mentoring to be most effective, clear parameters must be identified and followed. These will be developed by the board, taking into account local circumstances such as geography, demographics, number of newly appointed school leaders, and the number of mentors available.

Effective Practice

Implementation parameters for the board to consider include:

- Identifying whether to recruit practicing and/or retired school leaders as mentors
- Providing one-to-one and/or whole group mentoring. It is recommended that a mix of the two be considered to enhance mentoring networks
- Developing a learning plan template for use in the school board
- Offering professional learning for mentors and mentees on their own and/or with a mixed group of mentors and mentees
- Encouraging relevant and appropriate forms of job-embedded and/or offsite mentoring
- Providing distance supports to address geographic constraints, considering the use of technology (e.g. SharePoint, Adobe Connect, web conferences)
- Specifying expectations for frequency and nature of contact between mentors and mentees. It is recommended that the board set a minimum number of contact hours (e.g. at least one form of contact per month)
- Specifying the extent to which supply coverage and travel costs will be provided for participants
- Taking into account any other parameters determined by the board

3.6 Recruiting and Selection of Mentors

A process for recruitment and selection of mentors that meets the unique needs of the board and its mentees must be established by the mentoring lead and/or steering committee. A careful selection process based on clear selection criteria will increase the chances for recruiting the best possible 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; ideally using the mentoring approaches outlined in Section 1.4, 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.

3.7 Preparing Mentors and Mentees

Preparing mentors for their role is a foundational success factor for Mentoring. Mentors require specific training and preparation to be effective. (e.g. skillful listening and coaching conversation skills). Boards must provide resources and training to mentors before mentoring begins and on an ongoing basis, as necessary. The board must also 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.
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 if it can be 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**

Mentors require specific training and preparation to be successful in their role. It is important to select those who demonstrate willingness and potential to learn the necessary skills and strategies for mentoring. Mentors should be reflective, innovative and forward-looking leaders who are focused on student achievement. They should:

- 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 training on topics such as cognitive coaching, blended coaching, emotional intelligence, neuro-linguistic programming workshops, as well as Mentoring webcasts and webconferences 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 type of 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

Links to association websites and resources to support the preparation and orientation of mentors and mentees are available through the ministry website at: [http://www.ontario.ca/eduleadership](http://www.ontario.ca/eduleadership)
Effective Practice

Joint orientation and preparation of mentors and mentees is recommended. Mentoring training may also 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:

- An overview of Mentoring, anticipated goals and results, and implementation parameters
- 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 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.

3.8 Initial and Ongoing Assessment of Mentee Learning Needs

The board must support mentees to assess their learning needs within the context of board goals for Mentoring. The results of the learning assessment will guide the work of the mentor and mentee.

Effective Practice

- Use a preliminary needs assessment to inform the match between the mentor and mentee, based on the domains, practices and competencies from the Ontario Leadership Framework
- Mentors and mentees conduct a more 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 through the two years of mentoring
3.9 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 and is conducive to learning, ideally for a period of up to two years.

**Effective Practice**

- Match the expertise of the mentor to the learning needs of the mentee, as identified in the preliminary learning needs assessment
- Use a matching form for mentors to complete, outlining their knowledge and experience using domains, practices and competencies from the Ontario Leadership Framework to identify their core strengths
- The mentee’s form includes the preliminary learning needs assessment, their school context (e.g. urban/rural/elementary/secondary), and their current knowledge and experience
- Give the mentee input on the choice of mentor with involvement of the Mentoring lead and/or steering committee

3.10 Exit Process

The board must establish an exit process for re-matching the mentee with another mentor, should the original match be unsuccessful. This must be done in a way that protects the integrity of the individuals involved. The exit process must be made clear to all mentors and mentees.

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.

3.11 Mentoring Learning Plans

School boards are required to develop a Learning Plan template for mentors and mentees to use through the mentoring process. In response to feedback from school boards and participants, and in the spirit of reducing paperwork, a sample template is provide in Appendix D and is based on the Annual Growth Plan template provided as part of the Principal Performance Appraisal (PPA) process. As the intent of the Learning Plan is to be confidential, a discreet section has been added to the template to be used within the mentoring context.

One of the first things the mentor and mentee must do together is develop a Learning Plan to guide the Mentoring process. The plan will reflect the learning needs of the mentee, identified through the learning assessment described in Section 3.8 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 as a basis for informing their mentoring Learning Plan. The Annual Growth Plan, within the context of PPA, must be signed by the supervisor. 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.
3.12 Mentoring Process

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. It is important that the mentor and mentee establish protocols for confidentiality and for working together at the beginning of the mentoring process.

Through the mentoring process, experienced mentors will determine which approaches to apply in individual situations as outlined in Section 1.5 (e.g., coaching, collaborating, and/or consulting). 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. As the professional repertoire of the mentee increases the nature of the relationship and advice and reflection will deepen accordingly.

Mentors are encouraged to refer to the *Conversation Starters and Sample Learning Plans* as a resource.

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**Effective Practice**

The mentoring relationship is:

- Planned and purposeful, driven by the professional learning needs of the mentee
- Based on trust, respect and confidentiality
- Non-evaluative and non-supervisory
### School Board Guideline for Implementation of Mentoring for Newly Appointed School Leaders

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<tr>
<th>Mentor</th>
<th>Mentee</th>
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| **Role Description** | Experienced principal or vice-principal (practicing or retired) who:  
  - is not a supervisor to the mentee  
  - has been carefully selected based on criteria, and  
  - has received training to prepare for the role | Newly appointed principal or vice-principal within his or her first and second year of practice  
  - See Section 3.2 for eligibility details |
| **Responsibility** | 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 initiatives) | 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 initiatives) |
| **Timelines** | Long-term, sustained, for a period of up to two years  
  - See Section 3.2 for eligibility details | Long-term, sustained, for a period of up to two years  
  - See Section 3.2 for eligibility details |
| **Format** | Work with mentees to provide structured, formal and informal mentoring, through one-on-one, and/or group support based on the learning needs of the mentee. This includes email, telephone and in-person contact  
  - The format may vary based on the learning needs of the mentee | Work with the mentor to identify learning needs and participate in various forms of mentoring in order to meet those needs |

### 3.13 Monitoring and Evaluation

The board is responsible for monitoring and evaluation 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 (Section 6). The ministry may also evaluate or engage external evaluators to assess the impact of the program and experience of mentors, mentees and others including steering committee members. More detail will be provided in advance of this taking place.
### 4. ROLES AND RESPONSIBILITIES

#### 4.1 Overview

The director of education, mentoring lead, 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.

#### 4.2 Roles and Responsibilities Chart

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

- √ = final approval (required)
- X = consultation and development (suggested)
- M = Mentee
- MR = Mentor
- SC = Steering committee
- ML = Mentoring lead
- DE = Director of education

<table>
<thead>
<tr>
<th>Activity/Report</th>
<th>School</th>
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<tr>
<td>Establish Mentoring lead</td>
<td>M</td>
<td>MR</td>
<td>SC</td>
<td>ML</td>
<td>DE</td>
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<tr>
<td>Establish steering committee</td>
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<tr>
<td>Integrate Mentoring with board succession and talent development plan</td>
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<td>Identify goals for Mentoring</td>
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<td>Develop Mentoring implementation parameters</td>
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<td>X</td>
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<td>X</td>
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<tr>
<td>Recruit and Select Mentors</td>
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<td>X</td>
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<tr>
<td>Prepare Mentors for Role (training/orientation)</td>
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<td>X</td>
<td>X</td>
<td>√</td>
<td></td>
</tr>
<tr>
<td>Orientation of Mentees</td>
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<td>X</td>
<td>√</td>
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<td>Initial and Ongoing Assessment of Mentee Learning Needs</td>
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<td>X</td>
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<tr>
<td>Match Mentors and Mentees</td>
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<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Provide an Exit Process</td>
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<td>X</td>
<td>X</td>
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<tr>
<td>Require and Support Mentoring Learning Plans</td>
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<td>√</td>
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<td></td>
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<tr>
<td>Conduct Monitoring and Evaluation</td>
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<td>Mentoring Implementation Plan to Ministry (October 2009)</td>
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<td>X</td>
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<td>Final Report to Ministry (July 2010)</td>
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<td>X</td>
<td>X</td>
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</tbody>
</table>
5. FUNDING

5.1 Overview

The ministry will fund boards to implement Mentoring for Newly Appointed School Leaders. Support is based on implementation of Mentoring according to the requirements set out in this guideline, and on the submission and approval of the October 2009 Mentoring Implementation Plan and the July 2010 Final Report.

Each school board that participated in Mentoring in 2008-09 has a three-year contract in place that is valid until 2010/11\(^3\) that specifies its funding allocation and deliverables. Should a board fail to meet the requirements or deadlines outlined in their Funding Agreement, the ministry may, at its discretion, cancel further transfer payments under the agreement and/or require the board to return any unspent funds already transferred.

5.2 Funding Allocation Model and Eligible Expenses

Each District School Board, non-amalgamated school authorities and the Provincial Schools Branch will receive base and proportional funding according to the number of newly appointed principals and vice-principals participating in Mentoring each year. The following payments will be made through the year\(^4\):

- Base allocation (August 2009)
- Up to 75% of proportional allocation (November 2009, upon receipt and approval of Mentoring Implementation Plan in October 2009)
- Up to 25% of proportional allocation (August 2010, upon receipt and approval of Final Report in July 2010)
- Note: see Section 6 for details of reporting requirements

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)
- 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 including travel and accommodations, in accordance with the Ontario Management Board of Cabinet Travel, Meal and Hospitality Expense Directive
- Program coordination and planning

\(^3\) Contingent upon ministry budget approval and approval of Final Report each year.
\(^4\) Note this represents a modification from the timelines and deliverables outlined in the Board Funding Agreement.
Expenditures that require pre-approval by the ministry include:

- Distance supports to address geographic constraints through the purchase of technology (e.g. software to facilitate distance mentoring or networking such as but not limited to SharePoint, Adobe Connect)

- Other expenses related to Mentoring not listed above

Boards are asked to contact their Regional Office to make the request for spending in these areas.

Ineligible expenditures 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.
6. REPORTING REQUIREMENTS

6.1 Overview

Boards are responsible for submitting a Mentoring Implementation Plan and a final report to the ministry. Should a board fail to meet these requirements, the ministry may, at its discretion, cancel further transfer payments under the agreement and/or require the board to return any unspent funds already transferred.

6.2 Mentoring Implementation Plan

In October 2009, boards will provide a completed Mentoring Implementation Plan for submission to the ministry. The template provided in Appendix C requests specific information about how the requirements outlined in this guideline will be met.

Based on approval of the Mentoring Implementation Plan, the ministry will determine each board’s proportional funding allocation for the year.

6.3 Final Report

The board will submit a final report in July 2010. The report will provide a variety of data, including the number of mentor and mentee participants over the year and the anticipated number of mentors and mentee participants in the following year. It will also include a funding compliance statement to ensure that boards have met the terms of the Funding Agreement for the year.

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Note this represents a modification from the timelines and deliverables outlined in the Board Funding Agreement.

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# Appendix A: PRINCIPAL ASSOCIATIONS CONTACTS

<table>
<thead>
<tr>
<th>Principal Associations Contacts</th>
<th>Tel.</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catholic Principals’ Council of Ontario (CPCO)</td>
<td>416 483-1556</td>
<td><a href="http://www.cpco.on.ca">http://www.cpco.on.ca</a></td>
</tr>
<tr>
<td>Ontario Principals’ Council (OPC)</td>
<td>416 322-6600</td>
<td><a href="http://www.principals.on.ca">http://www.principals.on.ca</a></td>
</tr>
</tbody>
</table>
Appendix B: Frequently Asked Questions
Implementation of Mentoring for Newly Appointed School Leaders

As the year proceeds, there may be updates to this list on a periodic basis. School boards will be advised of changes as they are made. Boards are also advised to check the ministry website for updates and new additional resources (http://www.ontario.ca/eduleadership).

Section I: Implementation

Q. Why is the ministry implementing Mentoring for Newly Appointed School Leaders?

School leadership matters. A commitment was made in the Ministry of Education’s “Energizing Ontario Education” vision paper to develop a comprehensive Ontario Leadership Strategy. The vision of the strategy is to support student achievement and well-being by attracting and developing passionate and skilled leaders in our schools and boards. Providing mentoring for every newly appointed school leader across the province is a key element of the strategy.

Mentoring is identified in the research and by educators in Ontario and other jurisdictions as one of the most powerful forms of professional support for principals and vice-principals. Mentoring can help accelerate learning, reduce isolation and increase the confidence and skill of newly appointed school leaders. It is also considered a tremendous learning and growth opportunity for experienced principals and vice-principals who become mentors.

Q. Does each board have to implement Mentoring for Newly Appointed School Leaders?

Boards are strongly encouraged to implement Mentoring but are not required to during the 2009-10 school year.

Q. Our board already provides Mentoring for school leaders. Do we have to change what we are doing to meet the ministry requirements?

In order to receive ministry funding for the implementation of Mentoring, boards must meet the requirements set out in the Mentoring guideline. The requirements are based on research, effective practice in Ontario and other jurisdictions, the mentoring element of the New Teacher Induction Program (NTIP) and the results of a mentoring pilot that took place in 20 school boards with the support of our principal association partners in 2007-08. The requirements are intended to build upon the mentoring that is already provided in some boards and provide a consistent, high-quality provincial approach. The guideline is available at http://www.ontario.ca/eduleadership.
Q. Where can boards get support to implement Mentoring?

There are a number of supports available for boards to implement Mentoring.

The Association des directions et directions adjointes des écoles franco-ontariennes, the Catholic Principals’ Council of Ontario, and the Ontario Principals’ Council will continue to offer training and resources for mentors, mentees and school boards. Information is available through the following websites:

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

The Supporting Effective School Leadership: A Handbook for Implementing Mentoring for Newly Appointed School Leaders in Ontario (March 2009) in particular is a helpful resource that was developed by associations in partnership with the ministry to support school board implementation of Mentoring (available on association websites).

Regional teleconferences between the ministry and board Mentoring leads will continue to be held to offer support and clarification.

Several regions have arranged sharing sessions for board leads and/or members of their steering committees and will host additional sessions in the coming year.

Please contact your regional Ministry of Education office for any other questions you may have.

Q. I want to offer training for my principals and vice principals on a number of topics such as legal issues, Teacher Performance Appraisal (TPA) and budgeting. Am I able to use Mentoring funds for the costs associated with these sessions? Am I able to include administrators that are not part of Mentoring?

The funding allocated for Mentoring is specifically to offer mentoring supports for those new to the role. These types of sessions can be offered within a ‘mentoring culture’, e.g., the mentor and mentee are both in attendance so that learning can be shared. Time may be set aside within the session for the mentor and mentees to explore the application of learning to their own context. Sessions can be expanded to include other principals and vice principals not in the formal program so long as the priority is placed on mentors and mentees.

Q. What if the board does not have enough mentors?

Boards have the flexibility and discretion to find a solution that will work for them. For example, if there are not enough practicing school leaders to become mentors, the board may consider seeking retired school leaders to provide mentoring. The board may also contact other boards to see if they have mentors available. In addition, the board may consider providing group mentoring support, whereby one mentor is matched with a small group of mentees rather than a single mentee. The board may need to make arrangements on an interim basis until more mentors are available.
Q. What will the financial report for Mentoring look like?

Efforts have been made to streamline board reporting for Mentoring. Boards are required to submit a Mentoring Implementation Plan to the ministry in October 2009 and a final report in July 2010. Boards must expend their base funding as well as 75% of their proportional funding by March 31, 2010. The remaining 25% of their proportional funding must be spent by June 30, 2010.

Boards must use the School Board Implementation Planning Template in Appendix C of the Mentoring guideline. The financial report will be based on the key areas included in the template.

Q. The Mentoring guideline states that there may be updates to the guideline on a periodic basis through the year. Is there an opportunity for boards to have input to the guideline?

Yes. During the 2008-09 implementation of Mentoring for Newly Appointed Principals, boards provided feedback on the Mentoring guideline, the results of which are reflected in the 2009-10 guideline. If you have additional feedback concerning the 2009-10 guideline, please contact your regional Ministry of Education office to provide any comments you may have.

Section II: Definitions and Eligibility

Q. What is Mentoring? What is the difference between Mentoring and Coaching?

There are many descriptions and definitions of mentoring and coaching among experts and in the research. The following are used for the purpose of ministry-funded Mentoring for Newly Appointed School Leaders.

Mentoring takes place through a long-term, sustained relationship between an experienced school leader (mentor) and a newly appointed school leader (mentee). It is focused on multiple aspects of the leadership role based on learning goals outlined in the mentee Learning Plan.

Coaching takes place as part of mentoring. It is provided on a short-term basis for the time required to achieve a specific learning goal. The mentor may provide the coaching, or it may be provided by another experienced leader either within or external to the board.

See Mentoring guideline, Section 3.11 Mentoring Process, for more information.

Q. Who is considered a “newly appointed school leader” for the purposes of Mentoring?

Newly appointed school leaders are principals and vice-principals in their first and second years in the role, including those with teaching responsibilities. Boards will determine whether to include those who are in acting positions. See Mentoring guideline, Section 3.2 Eligible Newly Appointed School Leaders for more information.
Q. Can an experienced principal that is new to a board be counted for funding purposes and included as a “mentee” in the Mentoring program?

The principal in this case would not fit the definition of “newly appointed” principal for the purposes of qualifying for funding. However, the board may chose to include the principal in whatever training/support the board deems necessary and may use their Ministry mentor funding for that purpose.

Q. Is it mandatory for newly appointed school leaders to participate in Mentoring?

Boards that receive funding for Mentoring must make it available to all newly appointed school leaders in the board. The board has the discretion to make it mandatory or optional for their newly appointed school leaders to participate.

Research and findings from our 2007/08 Mentoring pilot show that mentoring is one of the most powerful forms of professional support for principals and vice-principals, and all newly appointed principals and vice-principals are encouraged to participate. The research also shows that mentoring works best when both mentees and mentors have opportunities to contribute to the mentoring process, the match between their mentor or mentee, and have flexibility in terms of identifying learning goals.

Q. Why is Mentoring provided to newly appointed school leaders only? What about experienced principals and vice-principals?

Mentoring is of particular benefit to school leaders in their first two years in the role. It provides the support needed for newly appointed principals and vice-principals to transition to the role, enhance their leadership practices and competencies, build relationships with the school community, and implement key school, board and provincial priorities.

Experienced principals and vice-principals have the opportunity to benefit from Mentoring by becoming mentors and attending professional learning opportunities that the board makes available. Results of the 2007/08 Mentoring pilot and from the 2008-09 mentoring survey identified that mentors spoke very highly of the training they received, in some cases referring to this training as being one of the best professional development opportunities they had ever received.

Q. Will Mentoring be provided to Supervisory Officers and Directors of Education?

The ministry is working in partnership with supervisory associations and the Council of Ontario Directors of Education to implement a province-wide approach to Mentoring for Newly Appointed System Leaders during 2009-10.

Q. Who can be a mentor? Can a mentor be a supervisor to his or her mentee?

Mentors are experienced principals or vice-principals, ideally with a minimum of three years in the role. Mentors may be practicing or retired. It is up to the board to identify mentors that meet the needs of mentees in the board. The mentor must not be a supervisor to his or her mentee. A list of suggested selection criteria for boards to consider is provided in Section 3.6 Recruiting and Selection of Mentors of the Mentoring guideline. It is also critical that mentors be formally trained prior to beginning their mentoring. The funding that boards will receive will support this training.
Q. If the mentor is retired; does he or she have to be “recently retired”? What are the criteria?

It is up to the board to identify mentors that meet the needs of mentees in the board and the selection criteria identified by the board. It is advised that boards refer to the suggested selection criteria listed in Section 3.6 Recruiting and Selection of Mentors of the Mentoring guideline when choosing their mentors, whether they are retired or practicing.

Q. What is the board’s responsibility to support mentors in their role? What is the benefit to mentors that participate?

The board must prepare mentors for their role by providing training and support resources. The experience of participants in the 2007-08 mentoring pilot and during implementation in 2008-09 demonstrates that mentoring has benefits for both mentors and mentees. Becoming a mentor is an enriching professional learning opportunity that enables experienced administrators to contribute to the success of those that are beginning their leadership career.

The board has discretion to use its Mentoring funding to provide supply coverage for mentors, provide training and resources and cover travel and accommodation expenses for mentors to attend training or to provide mentoring. See a list of eligible expenditures in Section 5.2 Funding Allocation Model and Eligible Expenses of the Mentoring guideline. Contact your regional Ministry of Education office for further information if needed.

Section III: Duration

Q. If someone is in their 2nd year as a principal or vice-principal when the province-wide Mentoring is introduced, does he or she get one or two years of support?

Typically in this case the mentee would receive one year of mentoring support. If the mentor and mentor agree that a second year is necessary, they may approach the board mentoring lead. The board can decide whether to continue the mentoring support.

Q. If a school leader has already received one year of mentoring through the board before the province-wide Mentoring was introduced; can he or she participate in a second year of mentoring this year?

Yes. If this person is in his or her 2nd year as a principal or vice-principal then he or she is eligible to receive one more year of mentoring.

Q. What if a new principal or vice-principal is not matched with a mentor until he or she is in the 2nd year in the role? Does the mentee get one year or two years of support?

Typically in this case the mentee would receive one year of mentoring support. If the mentor and mentor agree that a second year is necessary, they may contact the board mentoring lead. The board can decide whether to continue the mentoring support.
Q. If a new principal or vice-principal is appointed in January or February; does he or she get one and a half or two years of support?

Typically in this case the mentee would receive one and a half years of mentoring support. If the mentor and mentor agree that a second year is necessary, they may contact the board mentoring lead. The board can decide whether to continue the mentoring support.

Q. If the mentor and mentee are at the end of the second year of mentoring and strongly agree that the mentee would benefit from another year of support, can they continue their mentoring relationship? Will they receive support from the board?

The mentor and mentee may continue their work in an informal manner beyond the two years of mentoring. If the mentor and mentor agree that a third year of formal mentoring is necessary, they may contact the board mentoring lead. The board can decide whether to continue the mentoring support.

Q. If someone receives mentoring as vice-principal in his or her 1st year then becomes a principal, is he or she eligible to participate in mentoring again? Is he or she required?

Yes. The mentor is eligible to receive Mentoring for up to two more years in their role as a newly appointed principal. If the mentor and mentor agree that two more full years of mentoring is not necessary, they may contact the board mentoring lead. The board can decide whether to discontinue the mentoring support.

Q. If the mentor and mentee have not yet completed their two years of mentoring and strongly agree that the mentee is no longer benefiting from the mentoring support, can they end their mentoring relationship?

If the mentor and mentor agree that two full years of mentoring will not be of benefit, they may contact the board mentoring lead. The board may consider assigning a new mentor to the mentee, or bringing the formal mentoring process to a close. However, in creating a ‘mentoring culture’, the board will want to continue to encourage mentoring relationships for all employees at all stages of their careers and to ensure that employees understand the benefits of those relationships. They would be encouraged both to seek them out for themselves as well as provide for others.

Q. If there is a conflict of personality or any other difficulty between the mentor and mentee; do the mentee and mentor have to accept the match? What if the difficulty comes up after the mentoring begins; can the mentee and mentor be re-matched?

It is important that the mentor and mentee are comfortable with their match, from the beginning and through the mentoring relationship. If either the mentor or mentee are having difficulty with their match, they should contact their board mentoring lead.

Boards receiving funding for Mentoring must have a process in place to rematch mentors and mentees in the case of an unsuccessful match. This must be done in a way that protects the integrity of the individuals involved and the process must be clearly articulated to all participants.
Section IV: Other Linkages and Implications

Q. The mentor cannot be in a supervisory role to the mentee. Does this mean that supervisors should stop all mentoring/coaching activities they are currently doing?

No. Supervisors play a critical role in supporting the development of the leaders they work with. Mentoring and coaching provide an excellent approach and set of skills that can be used in a variety of situations. It is advised that supervisors that are using these skills with the leaders they supervise continue to do so. If there is a formal mentoring and/or coaching relationship currently taking place between a supervisor and a newly appointed school leader, the supervisor or the new leader may wish to contact the board mentoring lead to determine how the board Mentoring can complement this work and/or where the efforts of the supervisor may be streamlined as a result of the supports that will be provided by the mentor.

Q. Is the Mentee Learning Plan self-directed?

The Learning Plan is developed in collaboration between the mentor and mentee based on the learning needs of the mentee. The content of the Learning Plan is largely directed by the mentee. The mentor will encourage the mentee to choose appropriate learning goals within the context of the board goals for mentoring. The Learning Plan is confidential between the mentor and mentee.