

OPSOA

Mentoring and Coaching Program for Supervisory Officials and Directors of Education



OPSOA MENTORING AND COACHING PROGRAM FOR SUPERVISORY OFFICIALS AND DIRECTORS OF EDUCATION

The Ontario Public Supervisory Officials' Association (OPSOA) Board of Directors endorses and supports the Mentoring and Coaching Program for Supervisory Officials and Directors of Education. This program engages newly appointed Supervisory Officials and Directors of Education in mentoring and coaching relationships and professional development opportunities that enhance learning and growth.

The program is aligned with OPSOA's Vision:

- To build supervisory officer capacity for leading the instructional program to achieve student success based on a foundation of equity and inclusion;
- To enhance leadership and skill development; and
- To create, sustain, and enhance organizational capacity.

The program is further supported with special funding from the Ministry of Education's Leadership Development Branch. The Ontario Leadership Strategy and the Ontario Leadership Framework provide the foundation for OPSOA's Mentoring and Coaching Program. Professional learning and leadership development are aligned with and reinforce the Five Core Leadership Capacities:

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

and the Ministry goals:

- Improving student achievement;
- Reducing the gap in student achievement; and
- Increasing public confidence and support for public education.

In consultation with the OPSOA membership, the program is designed to respond to the changing needs of the OPSOA membership and the Ontario educational community.

Welcome to the OPSOA Mentoring and Coaching Program. OPSOA takes pride in this program and trusts that the mentoring and coaching relationship will enrich your professional growth.

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MINISTRY OF EDUCATION ONTARIO LEADERSHIP STRATEGY AND ONTARIO LEADERSHIP FRAMEWORK

MENTORING FOR NEWLY APPOINTED SYSTEM LEADERS – DIRECTORS AND SUPERVISORY OFFICERS

[Mentoring for newly appointed system leaders](#) was implemented province-wide in 2009-10 following a field test in 2008-09. System leaders who are in their first and second years in the role are eligible to receive mentoring supports from their Director and Supervisory Officer associations in partnership with school boards.

The Ministry's vision paper Reach Every Student: Energizing Ontario Education paper commits to the development of a comprehensive leadership strategy to ensure that school leaders have the support they need to be successful in fulfilling this responsibility.

THE ESSENTIAL ROLE OF SYSTEM LEADERS

Without support for system leaders it is more difficult to impact principal leadership in the learning agenda. This is largely because the Supervisory Officer, as a system leader, plays a crucial role in creating the conditions of success for principals.

Today's Supervisory Officer plays an indispensable role in supporting school leadership. Both Directors of Education and Supervisory Officers are in a position to make moral purpose a system quality. This means publicly fostering commitment throughout the school board to raise the bar and close the gaps in student learning.

WHY MENTORING AND COACHING FOR SYSTEM LEADERS?

Mentoring is not new to Directors of Education and Supervisory Officers in Ontario. With varying levels of formality and structure, experienced experts or veterans have always supported and assisted their less experienced colleagues. What is new is the direction and approach the Ministry is taking to support leadership development. Implicit in this strategy is an expanded vision for mentoring that places mentoring on a continuum of professional development rather than as a brief or isolated add-on.

In the 2007 pilot and in the 2008 field test, the Ministry promoted a standard approach to Mentoring. This included a set of common parameters derived from research and professional practice.

For system leaders to fulfill the essential role they play in the success of school leaders, they also require supports tailored to their unique roles. It has been said that the challenge that is

implicit in the work of Directors of Education and Supervisory Officers is to maintain their resolve, energy, and effectiveness from the moment they take on their new role. School boards must provide structures and cultures that are supportive of Directors of Education and Supervisory Officers. So, on the one hand, system leaders are charged with the responsibility of creating the conditions for school leaders to be successful and, on the other hand, they too need supportive conditions within the systems in order to fulfill this responsibility.

Mentoring has been identified as one of the most powerful forms of support that can be provided a new system leader. Mentoring is just one of the supports that creates the conditions that allow new system leaders to experience success when they take on their new role. In the face of multiple demands and priorities, mentoring can accelerate learning, reduce isolation, and increase the confidence and skill of newly appointed system leaders.

CONTEXT OF MENTORING AND COACHING SYSTEM LEADERS

System leadership is a complex and demanding role. Directors of Education and Supervisory Officers must ensure that the conditions for success needed to support student achievement and well-being are in place in their schools and in the system as a whole. Tri-level alignment of supports and initiatives that foster school, school board, and provincial collaboration and commitment to student success is essential to building and strengthening system leader capacity.

LEADERSHIP DEVELOPMENT

Leadership is second only to teaching in its influence on student achievement. Research indicates that there is no documented case of a school successfully improving its student achievement in the absence of talented leadership. That is why Ontario's Ministry of Education has developed a provincial leadership strategy that will foster the highest quality leadership possible in schools and boards across the province.

ONTARIO'S LEADERSHIP STRATEGY

As a support to Ontario's education system leaders, the Ministry of Education launched the Ontario Leadership Strategy (OLS), a comprehensive plan of action designed to support student achievement.

WHAT IS THE THEORY OF ACTION FOR THE OLS?

The OLS holds that significant progress towards meeting the province's core education priorities can be accomplished by:

- Supporting districts in developing, implementing, and measuring the impact of their leadership development strategies;
- Inviting and facilitating the influence of partners to advance the goals of the OLS; and
- Championing the development of initiatives that will enhance the coherence of leaders' work across the province.

THE GOALS OF THE OLS

- Attract the right people to leadership roles.
- Develop personal leadership resources in individuals and promote effective leadership practices in order to have the greatest possible impact on student achievement and well-being.
- Develop leadership capacity and coherence in organizations to strengthen their ability to deliver on education priorities.

ONTARIO'S LEADERSHIP FRAMEWORK 2012

The Ontario Leadership Framework (OLF), which describes what good leadership looks like, is the foundation for the OLS. To ensure that the framework is up to date with research evidence about leadership that makes a difference to student achievement and well-being, Kenneth Leithwood, Ontario Institute for Studies in Education (OISE)/University of Toronto Professor Emeritus and Advisor on Leadership for the Ministry of Education, conducted an extensive review of the latest research, including Ontario-specific data on district effectiveness. The findings of his study informed the revisions to the framework. The revised version, the Ontario Leadership Framework 2012, includes only those practices and personal leadership resources supported by robust evidence.

The Institute for Education Leadership (IEL) is leading the launch, distribution, and implementation of the Ontario Leadership Framework 2012.

Ontario's Leadership Framework 2012 is made up of two parts:

1. Leader practices that have been shown through research to be effective in improving student achievement; and
2. System practices and procedures that boards should have in place to support school and system leaders to be effective.

The OLF describes what good leadership looks like and provides the foundation for implementing the OLS. The framework supports career-long professional learning and helps guide learning-focused conversations about effective leadership practices and approaches to resolving issues. The focus is on five Core Leadership Capacities described in the OLF:

1. Setting goals
2. Aligning resources with priorities
3. Promoting collaborative learning cultures
4. Using data
5. Engaging in courageous conversations

PERSONAL LEADERSHIP RESOURCES

In addition to the practices found to be effective for most schools, systems and leaders in most contexts, the OLF includes a small but critical number of personal resources which leaders

draw on in order to enact effective leadership practices. Considered together, these resources substantially overlap some of the leadership “traits” which preoccupied early leadership research and which lately have proven to be powerful explanations for leaders’ success.

Leadership traits have been defined broadly as relatively stable and coherent integrations of personal characteristics that foster a consistent pattern of leadership performance across a variety of group and organizational situations.

While many traits or personal characteristics have been associated with leaders and leadership, the OLF includes only those for which there is compelling empirical evidence indicating they are instrumental to leadership success. Referred to in the OLF as “personal resources”, they are of three types– cognitive, social, and psychological.

1. Cognitive Resources

- Problem solving expertise
- Knowledge of effective school and classroom conditions with direct effects on student learning

2. Personal Leadership Resources

- Leaders draw upon the Personal Leadership Resources to effectively enact leadership practices
- Social resources
- Perceiving emotions
- Managing emotions
- Acting in emotionally appropriate ways

3. Psychological Resources

- Optimism
- Self-efficacy
- Resilience

The Ontario Leadership Framework 2012 is an integral component of the OPSOA Mentoring Coaching Program.

For required reading about the OLS and the OLF, visit:
http://iel.immix.ca/storage/6/1360068388/Final_Research_Report_-_EN_REV_Feb_4_2013.pdf

Most of content and direct wording in the previous section is attributed and credited to the research and writings of Kenneth Leithwood, Ontario Institute for Studies in Education/University of Toronto Professor Emeritus & Advisor on Leadership for the Ministry of Education, as per the referenced link to The Ontario Leadership Framework 2012, with a Discussion of the Research Foundations, March 2012.

PROGRAM OVERVIEW

The OPSOA Mentoring and Coaching Program was created in the spring of 2004 when the OPSOA Board of Directors approved the establishment of a mentorship program for newly appointed supervisory officials. Beginning in 2007, the mentoring program was extended to include a separate program for newly appointed directors of education. Both programs offer support to participants within their first two years of appointment with an emphasis equally focused on mentoring and coaching.

Open to all members of OPSOA, the Mentoring and Coaching Program parallels the leadership practices and competencies reflected in the OLF. The OPSOA Mentoring and Coaching Program is supported and funded by the Leadership Branch of the Ministry of Education.

Reach Every Student: Energizing Ontario Education, 2008 identified school leadership as a key supporting condition for achieving the province's three core education priorities:

1. High levels of student achievement;
2. Reducing gaps in student achievement; and
3. Increasing public confidence in publicly funded education.

Real and lasting improvement in Ontario schools requires every school to have a culture of collaborative professionalism, in which educators work together to use evidence to improve their practice and students' learning. The creation of thousands of such schools calls for high-quality leadership throughout the system. In addition, development of school district leadership can improve the ability of leaders to act together within and across districts to implement the three core priorities and provide the supporting conditions for learning.

*– B. Pervin, M. J. Gallagher, G. Clarke, J. Grieve,
G. Sékaly, & R. Théberge, Assistant Deputy Ministers,
Ministry's Leadership Implementation Team, 2010*

In 2012, the OPSOA Mentoring and Coaching Program added a Year 2 component available to supervisory officials who wished to extend their involvement in the program for a second year. The focus and activities for this Year 2 Program are established collaboratively by the mentee and mentor and are based on the individualized needs and goals of the mentee.

PROGRAM OUTCOMES

Through the mentoring and coaching relationship, the mentor-coach will assist the mentee in successfully achieving the following outcomes.

The mentee:

- Sets realistic directions, participates in building a shared vision for the organization and articulates high expectations for performance for all;
- Builds positive, trusting relationships with all stakeholders in the best interest of students and their success;
- Supports the organization in fostering collaborative cultures within the educational community;
- Models instructional leadership for teaching and learning by setting high expectations for learning outcomes and assessment; and
- Establishes conditions for appropriate accountability for all stakeholders in ensuring student success and high quality education.

ESSENTIAL COMPONENTS OF THE OPSOA MENTORING COACHING PROGRAM

- One-on-one confidential mentoring and coaching of a Supervisory Official or Director of Education by either an OPSOA Alumni or an active Superintendent or Director;
- Continuous intake to the program and with the one-to-one relationship expected to last for the equivalent of one academic year;
- A second year of mentoring is available for individual mentees who wish to extend the mentoring and coaching relationship, either with the original mentor or with a new mentor, if requested;
- Program funding is provided by the Ministry of Education's Leadership Development Branch;
- The program is administered by an OPSOA member who serves as the Coordinator of the OPSOA Mentoring and Coaching Program for Supervisory Officials and Directors of Education;
- Mentor-coaches may be recommended by directors and/or respond to an invitation from the Coordinator;
- Mentor-coaches have expertise in addressing the challenges in public education in Ontario and have volunteered to participate in the program;
- Mentees include newly appointed Supervisory Officials and Directors of Education, at any point during the first two years of their appointment;
- Each mentor-coach and his/her mentee meet face-to-face for up to six occasions in the Year 1 Program and for up to four occasions in the Year 2 Program. Technology, including email and telephone may be utilized to complement communication;
- Extreme geographic distance between mentee and mentor-coach may require that videoconferencing, such as Skype, replace some of the face-to-face meetings;
- Job shadowing and board visit opportunities are available to mentees;

- Training provided to the mentor-coaches builds on mentoring and coaching skills;
- Mentor-coaches and mentees receive a handbook outlining the program expectations, responsibilities, mentoring and coaching skills, and relevant resources available;
- Mentor-coaches and mentees participate together in one or more centrally organized professional development sessions to share their experiences, refine their skills, and expand their professional networks; and
- Mentor-coaches and mentees participate in an assessment of the program near the end of the mentee's formal involvement. Data are used to inform refinements or adjustments to the program for future participants.

DUAL EMPHASIS: MENTORING AND COACHING

The Ministry's [Mentoring for Newly Appointed School Leaders Requirements Manual](#), describes mentoring approaches in the following manner.

MENTORING APPROACHES

Mentoring is an iterative and reciprocal learning process and is modified to meet the changing needs of the newly appointed system leader. 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). The following possible approaches are intended to assist associations as they implement mentoring.

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 that is developed by the mentee with the assistance of his or her mentor.

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.

OPSOA emphasizes primarily a mentoring and coaching approach.

Additional resources regarding Mentoring and Coaching are listed at the end of this handbook.

Some observations by researchers regarding the role of the mentor or coach:

- “A facilitative partner in an evolving learning relationship focused on meeting mentee learning goals and objectives.” (Zachary, 2000)
- “The mentor’s role has evolved from the ‘sage on the stage’ to the ‘guide on the side’.” (Zachary, 2000)
- “Mentors manage the mentoring process by providing a safety net, holding a place for connection and offering a wellspring of trust.” (Daloz, 1999)
- “When we coach, we elicit the solution from the client. In its purest sense, we believe that the right answer is within them. This doesn’t mean that the mentor-coach shouldn’t use his/her intuition to challenge, prompt, enthuse, inspire, or ask ‘dumb questions’. When we mentor, we share wisdom. The mentor is typically more experienced, more knowledgeable and older and the other person wants to access as much of that as he/she can.” (G. Hoult, Coaching Educators, IARTV, 2005)

Mentor-coaches provide guidance, moral support, and expertise to newly appointed Supervisory Officers and Directors of Education and encourage their personal, professional, and institutional growth within a safe, confidential, collegial relationship. They affirm and empower their mentees.

Facilitating an effective learning relationship between mentor-coach and newly appointed Supervisory Officers and Directors of Education requires that the mentor-coach must:

- Be experienced and skilled working with adults;
- Be knowledgeable and skilled in educational administration and current issues;
- Commit to supporting the success and effectiveness of the mentee;
- Have demonstrated skills in problem solving;
- Model analytical and reflective practice;
- Be able to facilitate goal setting;
- Be available and open to the views of the mentee and others;
- Be willing to address issues through honest feedback;
- Be effective listeners and communicators;
- Have effective interpersonal skills;
- Honour the confidentiality of work with the mentee;
- Construct a relationship built upon trust and permission; and
- Practice in an ethical manner.

Adapted from: Blended Coaching, Creating a Mentoring Culture, The Mentor’s Guide.

A mentor-coach:

- Supports newly appointed system leaders in making a smoother and less stressful transition to their role;
- Increases mentee confidence and ability to make decisions more effectively;

- Enables mentees to step back from their business in order to look at the “big picture” and reflect on their role;
- Provides a sounding board: listens, stimulates, and challenges the mentee’s thinking;
- Offers guidance, provides helpful advice, cautions against potential pitfalls and instills confidence;
- Leverages networks, puts the mentee in touch with key people in the organization as well as other professionals; and
- Provides accountability, increases leadership skill and understanding, helps the mentee set goals and milestones as well as encourages the mentee to be accountable for delivering on them. Mentoring also offers tremendous growth opportunities for mentors through training and skill development.

Ministry of Education 2009.

A mentor-coach must be able to:

- Demonstrate willingness and potential to learn the necessary skills and strategies;
- Provide higher level supports, for example, in the areas of system thinking, change management and strategic planning, the core competencies for system leaders;
- Commit to the time it takes to build their ability as mentors; to build a structure for the year, having an agenda for each session and contributing to the mentoring session (e.g., bringing other resources into the conversation); and
- Focus the mentoring effort in support of organizational goals and priorities.

Our mentees say:
“I really appreciated the opportunity to talk openly and confidentially about technical, political, and relationship issues that confronted me during my first nine months on the job.”

Mentor-coach skills and credibility are critical elements for the mentee’s buy-in and commitment to the mentoring and coaching process. Mentors-coaches are selected on the basis of their perceived credibility as well as their ability to provide mentoring and coaching supports. They understand current education system priorities and initiatives and have experience working with adult learning styles.

Mentors-coaches should be reflective, innovative and forward-looking leaders who are focused on student achievement.

Adapted from: Mentoring for Newly Appointed System Leaders Requirements Manual 2011.

Our mentor-coaches say:
“The program is much more than mere professional development. It is professional relationship-building, founded on trust and mutual respect which in turn enables discussions, decision-making, and problem-solving to flourish.”

Within the OPSOA context, this means ongoing support by the mentor-coach and regular discussion and reflection by the mentee of his/her system priorities and operational issues. With increased experience and supported by an effective mentoring and coaching relationship, the mentee will develop an increased repertoire of skills. The mentee develops and implements a plan of action suitable to his/her particular circumstance and district school board context. This plan of action should be recorded by the mentee in the Learning Plan Template (see suggested template in Appendix B) and regularly updated at subsequent meetings with the mentor-coach.

BENEFITS OF THE OPSOA MENTORING AND COACHING PROGRAM FOR SUPERVISORY OFFICIALS AND DIRECTORS OF EDUCATION

Benefits of the program are as follows:

- The Ministry of Education’s OLF provides the foundation for the mentoring and coaching program, and all relevant Ministry and OPSOA resources are made available to mentees to support them in their work;
- Mentees will be able to discuss, in confidence, issues related to their roles with experienced and active practitioners, who have the time to listen and the experience to help mentees reflect and grow professionally and personally; and
- The program allows the mentees to become more knowledgeable about their professional organization, OPSOA, and it enables them to build a network within it.

Our mentees say:
“It was really what I was looking for – ‘a rest stop on a marathon.’”

SELECTION OF MENTOR-COACHES

Each year OPSOA canvasses its alumni and active members to ascertain their interest in participating in The Mentoring and Coaching Program for Supervisory Officials and Directors of Education.

To be eligible for the program, the alumni and active member must:

- Be in good standing with OPSOA;
- Be informed and current about educational policies and issues facing supervisory officials today;
- Be available for up to six face-to-face meetings in the Year 1 Program and up to 4 meetings in the Year 2 Program, along with e-mail and/or telephone contact with their mentees. It is recognized that videoconferencing may have to replace some face-to-face meetings in northern or remote areas;
- Attend training for mentor-coaches; and
- Participate with their mentee, along with other mentor-coaches and mentees, in one or more centrally organized professional development sessions.

The Director of Education or designate for a participating district school board may indicate a preference for mentor-coaches to be alumni or active Supervisory Officials (SO) from inside or outside that district school board.

Our **mentor-coaches** say:
“The most valuable part of this for the mentees seems to be the confidential sounding board. Although we do not hold all of the answers, it is an opportunity to explore a variety of solutions and approaches and to share the experiences and ideas of day-to-day survival and effectiveness on the job.”

The Coordinator will conduct discussions, as may be appropriate, with that Director or designate and mentee as potential matches are identified and obtain tentative approval for a proposed match. The Coordinator will then inform the mentor-coach and the mentee of the proposed match before the program begins. Where either party is uncomfortable with the proposed match, the Coordinator will seek another mentor-coach for the mentee.

In cases of northern or remote district school boards, it may be necessary to assign a mentor-coach to more than one mentee. When this is done, however, each relationship remains one-on-one.

See Mentor-Coach Profile in Appendix B.

EXPECTATIONS OF MENTOR-COACHES

The mentor-coaches are expected to:

- Participate in the mentor-coach training sessions and one or more centrally organized professional development events with his/her mentee and the group of mentor-coaches and mentees;
- Maintain confidentiality about all discussions with the mentee;
- Schedule the initial meeting with the mentee as soon as possible following the matching process;
- Maintain regular contact with the mentee, including the scheduling of up to six face-to-face meetings in the Year 1 Program and 4 meetings in the Year 2 Program, in addition to e-mail, telephone communication, and videoconferencing, as may be appropriate;
- Facilitate communication more frequently with the mentee during the initial months of the relationship;
- Act as a personal resource to the mentee and encourage the mentee to raise issues with the mentor-coach that he/she may not be able to raise with others;
- Avoid making value judgments on the policies, procedures, practices, and/or culture of the mentee's district school board;
- Assume both the mentoring and coaching roles;
- Be proactive or reactive depending on circumstances and focus on variables to consider rather than offering solutions;
- Seek the assistance of the Coordinator, when necessary, and through him/her, the expertise and wisdom of the team of mentor-coaches;
- Participate in the annual assessment of the program; and
- Honour all requirements of the program as outlined in this handbook.

SELECTION OF MENTEES

The director in a participating district school board will identify the names and positions of mentees to the Coordinator of the OPSOA Mentoring and Coaching Program for Supervisory Officials and Directors of Education. The Director may offer a preference or recommendation for mentor-coaches.

Once the Coordinator receives the names of the mentees, the Coordinator will contact the Director and in consultation with the director and the mentee, will initiate the matching process of the mentee with an appropriate mentor-coach. When a match is proposed, the Coordinator will make a recommendation to the Director and obtain the director's approval before confirming the proposed match.

The Coordinator will then inform the mentee and the mentor-coach about the match.

If, for any reason, either party is uncomfortable with the match, the Coordinator will seek another mentor-coach.

See Mentee Profile in Appendix B.

EXPECTATIONS OF THE MENTEES

The mentees are expected to:

- Participate actively in the program, including attending one or more centrally organized professional development events with his/her mentor-coach and the group of other mentees and their mentor-coaches;
- Devote the time that the program requires and be honest and forthright in discussion;
- Maintain confidentiality about all discussions with the mentor-coach;
- Seek the assistance of the Coordinator, if needed, through the district school board's director;
- Participate in the annual assessment of the program;
- Develop, in consultation with the mentor-coach, a Learning Plan that will be reviewed regularly at meetings with the mentor-coach (see Learning Plan Template in Appendix B); and
- Honour all the requirements of the program as outlined in this handbook.

Our mentees say:
“The opportunity to share, seek opinions and ask for advice in a confidential, trusting, arms-length relationship regarding issues that would not be discussed with colleagues”

ACCOUNTABILITY

ACCOUNTABILITY: A JOINT RESPONSIBILITY

Accountability for the OPSOA Mentoring and Coaching Program for Supervisory Officials and Directors of Education rests jointly with the Coordinator and the district school board's director.

BEGINNING THE MENTORING RELATIONSHIP

The mentor-coach should make the initial contact by telephone to schedule the first meeting. This should be done as soon as possible after the matching process is confirmed. The location of the first and subsequent meetings will be determined by the mentor-coach and mentee. The mentee needs to ensure that the location will allow for uninterrupted time for the meeting.

THE FIRST MEETING

The establishment of the relationship is a key focus of this meeting. Accordingly, possible topics include:

- Introductions;
- Schedule of Meetings;
- Types and Frequency of Communication;
- Overview of the Program;
- Expectations/Outcomes;
- Mentee's Strengths and Areas of Confidence;
- Mentee's Needs;
- Mentor-Coach's Strengths and Experiences;
- Mentee's Job Description and Present Working Environment;
- Current "Hot" Issues;
- Entry Plan;
- Logistics (locations of meeting, telephone numbers and email addresses, etc.);
- Time Commitment;
- Reviewing the Mentee/Mentor-Coach Agreement; and
- Developing the Mentee's Learning Plan.

It may be helpful to start the conversation at this meeting and possibly in subsequent meetings by the mentor-coach asking two questions:

- “What has kept you awake at night (since our last meeting)?”; and
- “What has happened (since our last contact) that makes you proud?”

POSSIBLE TOPICS OF DISCUSSION DURING THE MENTORING AND COACHING PROGRAM

The content of the discussions between the mentor-coach and the mentee will vary according to the needs of the mentee, the circumstances related to the mentee’s assignment and the chemistry of the relationship between the mentor-coach and the mentee.

Possible topics include:

- | | |
|---|--|
| <ul style="list-style-type: none"> ▪ Entry Plan and Beyond (how to “look ahead”) ▪ Long and Short Term Planning ▪ Working with Trustees ▪ The Political Side of the Assignment ▪ Succession Planning ▪ Priority Setting ▪ Time Management ▪ Peak Period Planning ▪ Dealing with a Struggling Principal, an Average Principal and a “Star” Principal ▪ Establishing Credibility and Confidence with other Supervisory Officials and the Director | <ul style="list-style-type: none"> ▪ How to Obtain a Resolution Between Opposing Parties ▪ Investigations ▪ Dealing with the Media ▪ Relationships with Central Departments ▪ Advocacy for Public Education ▪ Building and Sustaining Relationships ▪ Handling Operational Issues ▪ Defining the Supervisory Official’s Role ▪ Networking and Resources for the Mentee’s Professional and Personal Growth ▪ Establishing Credibility and Confidence with Principals (both in the mentee’s former panel and those in the other panel) |
|---|--|

Complete confidentiality is a key to the success of the program. The mentee must be comfortable in raising any issue and confident that the mentor-coach will be honest and open, and that the conversation will be kept in absolute confidence.

Mentor-coaches must realize that mentees often do not know their needs, may get caught up in the daily demands of their assignments and may sometimes feel they do not want to impose too much on the time of the mentor-coach. With this in mind, mentor-coaches should not become frustrated if the

Our mentees say:
“Definitely, every time we met I was able to become totally removed to become more objective and reflective. It was good to get a different, unbiased perspective.”

mentee seems to lack initiative in making contact and the mentor-coaches should assume the lead role in making this contact.

The focus of the program is on “things to consider” rather than on “giving answers”. It is critical that the mentor-coach help the mentee look at all sides of possible resolutions and not be seen by the mentee as an expert with all the answers. The opportunity for “reflection” is a major component of the program and must be built into the relationship. The sample template designed as a Private Log (see Appendix B) to be kept by the mentee, may be helpful.

IF THE RELATIONSHIP IS NOT WORKING—AN EXIT PROCESS

It is possible that the match of the mentor-coach and the mentee will not be a good one despite the initial approval by the parties. One or both of the individuals may come to feel that the relationship is not working.

Once the program has begun, the mentor-coach, mentee or director or designate may contact the Coordinator to indicate that the relationship is not working. The Coordinator will then discuss the matter with the mentee and mentor-coach. If the decision is made to terminate the relationship between these two individuals and if the mentee wishes to stay in the program, the Coordinator will attempt to find a different mentor-coach for the mentee. All parties involved in the decision to terminate the mentoring relationship will keep the discussion and outcome in the strictest confidence.

CLOSURE: KEY COMPONENTS

It is through the process of coming to closure that mentoring partners are best able to capitalize on what they’ve learned in the mentoring relationship. Coming to closure offers a rich opportunity for growth and reflection, regardless of whether or not a mentoring relationship has been positive. It is a place marker, in the sense that it offers a welcome opportunity for transition and leveraging learning. The hallmark elements of successful closure include:

- Planning;
If closure is to be a mutually satisfying and meaningful learning experience, mentoring partners must prepare and plan for it. Sometimes obstacles or circumstances force premature closure of the relationship. It is important to consider coming to closure under the best circumstances, as well as under circumstances that are less than ideal.
- Discuss the best-case scenario;
What would we ideally like to see happen when this mentoring relationship comes to an end?
 - How can we ensure that the relationship reaches a positive learning conclusion?
 - If the ideal isn’t possible, how can we still ensure a positive learning outcome?
- Anticipate worst-case scenarios and potential obstacles;
 - What might get in the way of a positive learning conclusion?
 - What might a positive learning conclusion look like under these circumstances?

- A learning conclusion;
A learning conclusion is a highly focused conversation about the specific learning derived from the mentoring experience. It is a no-fault conversation focusing on both the process and content of the learning.
 - Talk about how you want to structure your learning conclusion conversation and agree on an agenda.
- Evaluate the relationship;
 - Were the learning goals realized?
 - If yes, what did you learn as a result of reaching your learning goals?
 - If no, what got in the way?
 - What else do you need to learn?
 - What worked well for you in the relationship?
 - What did you learn as a result of the process?
 - What did you learn about yourself as a learner?
 - What did you learn about mentoring? About being a mentor? A mentee?
 - What would you do differently next time?
- Integration of learning; and
Good closure focuses on applying and integrating what you have learned as a result of the relationship—taking it to the next step and leveraging your learning.
Discuss:
 - How you will apply what you’ve learned.
 - What you will do as a result of what you’ve learned.
 - The action steps you will take.
- Celebration of success
Celebration is a fundamental part of healthy mentoring relationships. Celebration at the conclusion of a mentoring relationship is critical for reinforcing learning and signals the transition process, which will redefine the relationship.
 - The celebration should be mutually significant.
 - Be sure to include opportunities to express appreciation as part of the celebration.
 - Look for meaningful ways to celebrate accomplishments consistent with the organization’s culture.
 - Don’t forget to celebrate mini-milestones along the way.

REDEFINITION OF THE RELATIONSHIP

Your relationship with your mentoring partner will change once the mentoring relationship ends. You may decide to continue the relationship on an ad hoc basis, informally or formally. Be proactive and talk about these changes before they take place and then move on.

When the relationship has been defined, it is time to take the next step and to move on.

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ANNUAL ASSESSMENT OF THE OPSOA MENTORING AND COACHING PROGRAM FOR SUPERVISORY OFFICIALS AND DIRECTORS OF EDUCATION

At the end of the program, the Coordinator will conduct an evaluation of the program using an assessment survey that will go to all mentees and mentor-coaches. The results of the surveys will be analyzed and will help to inform refinements or adjustments to the program.

Also, during the program, the mentee is expected to keep a Private Log (see Appendix B) of the experience.

Although this log will not be shared with anyone, it has two purposes:

1. To track the experience to allow for self-reflection during and at the end of the program; and
2. To serve as an outline of issues discussed both as a reflective experience and to track issues to their completion.

SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES

INVENTORY TABLE AND GUIDE

The role of the Supervisory Officer with Business Responsibilities is organizationally related to his/her academic counterpart but is uniquely different in scope of responsibilities.

The OPSOA Mentoring and Coaching Program includes and supports the work of “all” Supervisory Officers who are members of OPSOA.

The mentoring and coaching strategies in this handbook can be equally integrated into the mentoring relationship of the Supervisory Officer Business Responsibilities mentee and mentor-coach.

However, it is understood that while this role is unique within a school board it remains at its core focused on the success of students.

As such, the inventory below has been developed to address the specific demands of the role and to support the work of the newly appointed Supervisory Officer Business Responsibilities.

INVENTORY OF SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES

The table below provides an overview of Supervisory Officer Business responsibilities. The areas of Human Resources, Plant Operations, Maintenance and Capital Construction are often the responsibility of a separate Superintendent.

Titles for this position in school board organizations may differ but all incumbents will usually hold a Supervisory Officer Business Qualification or working towards it. Some title examples include, but are not limited to: Superintendent of Business, Superintendent of Finance, Associate Director, Chief Financial Officer, Superintendent of Human Resource, and Superintendent of Plant and Facilities.

Depending on the organizational structure of the school board, the Senior Business Official (SBO) involvement in any of these activities may range from direct, at the highest level, to awareness, at the lowest level. Each Supervisory Officer Business mentee will have to assess his/her level of involvement in these activities in their own organization.

The inventory table may not provide for all business responsibilities within each organization and as a result it is incumbent on the mentee to ensure all their areas of responsibility assigned to them in their organization structure are managed accordingly. Also, the inventory table is not meant to replace local job descriptions etc., but rather as a reference tool or guide to the mentee.

The data in the inventory table was developed with input from the Superintendent Officer Business Responsibilities Mentors and Mentees in the OPSOA Mentoring and Coaching Program and with input from the Council of School Business Officials.

TABLE OF SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES				
POLICY ADMINISTRATION	TREASURY	FINANCE AND PROCUREMENT	HUMAN RESOURCES	PLANT OPERATIONS AND MAINTENANCE AND CAPITAL CONSTRUCTION
<p><i>Note: In organizations where the SBO is not fully responsible for these functions, the Business Superintendent should have awareness or some level of involvement due to the financial risks associated with such activities. For Human Resources (HR) duties such as recruitment, appraisals have not been included as they are usually within the full responsibility of HR.</i></p>				
Liaison with Board of Trustees and Senior Administration on Policy Matters falling with the areas of responsibility of the Business Division or policy that may have a financial impact or risk component to the board	Banking	Accounting	Attendance Management	Custodial Services Management
Monitoring Policy Compliance/Risk and Reporting	Long-Term Debt Financing	Financial Reporting, Ministry Estimates, Revised Estimates, and Annual Financial Statements	Pay and Benefits Processing/ Compliance to Legislation and Collective Agreements	Building Maintenance Management
Implementation of Policy Directly affecting the Business Division	Trust Fund Management and Investing	Annual Audit	Employee Benefit Cost Management including WSIB and Schedule II Budgeted Rate Recovery	Building Security/Fire Services Protection
Research and Preparation of Policy Drafts	Board Surplus Funds Investment	Budget Planning, Preparation, Management, and Control	Collective Bargaining	Property and Liability Insurance
Identify Areas Where Policy Needs to be Developed or Revised	Short-Term Borrowing	Payables	Pay Equity Compliance and Employee Compensation Management	Capital and Major Maintenance Expenditure Forecasting/Accommodation
Adherence to Protection of Privacy and Freedom of Information Policy	Capital Financing	Tuition Fee Calculation Billing and Collection	Budget Staff Allocation Compliance	Well Water Management and Safety
	Reserve Fund Management	Grants and Revenue Management	Monitoring Grievance and Arbitration Proceedings for Potential Liability	Building Accessibility
	Education Development Charges	Issuance and Management of all Procurement (Requests for Proposals or Purchase Orders) and or Ensuring Adherence to the Related Board Policies	Accident Investigation and Labour and Workplace Safety and Insurance Board (WSIB) Compliance	Building and Fire Code Compliance

TABLE OF SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES

POLICY ADMINISTRATION	TREASURY	FINANCE AND PROCUREMENT	HUMAN RESOURCES	PLANT OPERATIONS AND MAINTENANCE AND CAPITAL CONSTRUCTION
<p><i>Note: In organizations where the SBO is not fully responsible for these functions, the Business Superintendent should have awareness or some level of involvement due to the financial risks associated with such activities. For Human Resources (HR) duties such as recruitment, appraisals have not been included as they are usually within the full responsibility of HR.</i></p>				
	School Banking	Payroll		Energy Management
	Cash Management	School Office Accounting and Cash Management		Waste Management and Recycling
	Donation and Gifting Management	Capital Asset Management		Grounds Management
		Travel and Expense Claim Management		Public Use of Buildings
		Class Size Monitoring		Land Acquisition and Sale of Property
		Procurement (Purchasing) Policy Adherence by all Departments of the School Board for all Purchases of Goods and Services		
		Tax Collection Unorganized Areas		Capital Construction Management and Financing
		Adherence to Records Retention Policies and Secure Storage and Records Management		Vehicle Fleet Management
		Sales Tax and Employee Deduction Collection and Remittance Management		

TABLE OF SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES

COMMUNITY USE OF SCHOOLS	INSURANCE RISK MANAGEMENT	SCHOOL OFFICE	PLANNING AND ENROLMENT	FOOD SERVICE MANAGEMENT
<p><i>Note: In organizations where the SBO may not be fully responsible for these functions, the Business Superintendent should have awareness or some level of involvement due to the financial risks associated with such activities.</i></p>				
Cost Recovery Management	Liability and Property Insurance Management	In Some School Boards Business Staff may Provide Oversight to School Office Staff in Relation to any Business Function Duties Performed in the School Office	Class Size Calculation	Cafeteria and Food Service Procurement
Rental Rates and Collection Management	Workers Safety Insurance Board Administration and Claims Management	School Funds Accounting and Management and Security	Enrolment and Class Size Projection and Management	Food Safety and Nutrition
Security, Accessibility, and Property Protection	Risk Identification and Assessment	Supplies and Equipment Procurement	Accommodation Review	Revenue Management and Control
Managing Risk Associated with Community Use of Schools and Property	Vehicle	Staff Training and Development as it Relates to Business Function Requirements	Monitor Zoning Applications and amendments	Provider Contractual Compliance
Marketing and Expanding School Use Opportunities	Capital Construction Insurance	Related Policy Compliance	Education Development Charges	

TABLE OF SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES				
COMMUNITY USE OF SCHOOLS	INSURANCE RISK MANAGEMENT	SCHOOL OFFICE	PLANNING AND ENROLMENT	FOOD SERVICE MANAGEMENT
<i>Note: In organizations where the SBO may not be fully responsible for these functions, the Business Superintendent should have awareness or some level of involvement due to the financial risks associated with such activities.</i>				
Manage Contractual Risk	Special Events Insurance			
Monitor Relationships between Users/Staff/ and School Board	Additional Named Insured		Monitoring Major Construction, Road, Environmental Services, Property Purchases and Traffic Patterns in Existing and Current School Areas	
	Student Insurance			
	Employee Benefit Contracts			
Manage Contractual Risk	Special Events Insurance			

TABLE OF SUPERVISORY OFFICER BUSINESS RESPONSIBILITIES				
TRANSPORTATION	HEALTH AND SAFETY	INFORMATION COMMUNICATIONS TECHNOLOGY	LEGAL	INTERNAL AUDIT
<i>Note: In organizations where the SBO may not be fully responsible for these functions, the Business Superintendent should have awareness or some level of involvement due to the financial risks associated with such activities.</i>				
Participate in Management of the Transportation Consortium	Regulation and Policy Compliance	Reliability of Communication and IT network security and Access	Partnership Agreements	Risk Identification
Transportation Budget Development, Monitoring, and Reporting	Manage Both Work Place and Student Safety	Hardware, Software and service budget and procurement	Shared Service Agreements Agencies, Boards and Government	Identification of Policy Reviews Requiring Compliance Testing
Board Transportation Policy Compliance/High Level Approval for Non-Compliance Issues such as "Out of Boundary Courtesy Rides"	Property and Asset Acquisition Compliance to Required Standards	Budget Planning and Financing	Claims or Contingent Liabilities arising from Legal Proceedings	Mitigation or Strategies Related to Internal Audit Recommendation
Route Management	Accident Reporting Requirements	Staff Management and Service Delivery	Property and Rental Agreements	Audit Committee
Monitor Supplier Procurement or Contract Management	Monitor and Address Mitigation Strategies to Reduce Employee and Student Injury	Ensure Enterprise Resource Planning Systems Meet Organization Needs. e.g. Communications Networks, Financial Systems, Human Resource, Enrolment Management, Student Information Systems and Attendance, Management, etc.	Asset Ownership	
Route Management	Accident Reporting Requirements	Staff Management and Service Delivery	Property and Rental Agreements	Audit Committee
Student Safety Emergency Planning	Monitor Operation Procedures to Ensure Compliance to Health and Safety	Software Licensing and Obligations are Maintained	Liabilities and Risk Arising from Labour Actions and Disputes	
	Emergency Planning	Cost Efficiency and Maximum Utilization of Resources		
		Staff Training and Development		

MENTORING AND COACHING PROGRAM FOR DIRECTORS OF EDUCATION

In the spring of 2007, the OPSOA Board of Directors approved the expansion of the OPSOA Mentorship Program to include newly appointed Directors of Education and practicing Directors of Education appointed to a new district school board.

The main components and program outcomes of the Mentoring and Coaching Program for Supervisory Officials and Directors of Education, described previously in this handbook, will apply to this program as well. The emphasis will be on mentoring and coaching new Directors of Education in all aspects of their work.

Although the selection, expectations, and training of mentor-coaches and the selection and expectations of mentees will be the same as for Supervisory Officials, all participants in this part of the program will be active or Alumni Directors of Education.

The unique nature of the role of the Director of Education, as the Chief Education Officer in a district school board and the isolation of the role warrants a modified approach to the delivery of the program from that described for Supervisory Officials.

In addition to Alumni Directors of Education serving as mentor-coaches to the Director of Education mentees, a team of active Directors of Education will also provide support through sessions to be held in the fall and spring of each year in conjunction with Public Council of Ontario Directors of Education (CODE) meetings. These sessions will deal with emergent issues of immediate interest/concern to the new Directors of Education and will be facilitated by the team of active Directors of Education. The sessions will focus on discussion of the issues and strategies to deal with them in the various district school boards represented by the participants.

The active Directors of Education facilitating these sessions will be selected using a process similar to that of the mentor-coaches.

SELECTION OF TEAM OF PRACTICING DIRECTORS OF EDUCATION

The Facilitator of the OPSOA Mentoring and Coaching Program for Directors of Education and the Executive Director of OPSOA will select a team of active Directors of Education to participate in the program.

To be eligible, the active Directors of Education must:

- Be in good standing with OPSOA and Public CODE;

- Be informed and current about educational policies and issues facing Directors of Education today;
- Be available to participate in the sessions to be held in conjunction with Public CODE meetings; and
- Be able to work in a team-coaching model.

EXPECTATIONS OF PRACTICING DIRECTORS OF EDUCATION

The active Directors of Education are expected to:

- Assist in identifying emergent issues/topics for discussion at the two one-day sessions;
- Facilitate the sessions held in conjunction with Public CODE meetings;
- Work in cooperation with the Facilitator of the Mentoring and Coaching Program for Directors of Education in following up on issues raised in these sessions;
- Maintain confidentiality about all discussions with the Director mentees;
- Avoid making value judgments on district school board policies, procedures, practices, and/or culture in the Director mentees' district school boards;
- Act as a resource to the Director mentees; and
- Participate in the annual assessment of the program.

The first five topics are of particular importance to new Directors of Education and should be incorporated into the discussions between mentor-coach and mentee early in the relationship. The degree to which the topics will be explored will depend on the previous experience of the newly appointed Director of Education.

POSSIBLE TOPICS OF DISCUSSION DURING THE PROGRAM

Possible topics for discussion are identified earlier in the handbook; however, practicing Directors of Education also identified these as areas which often require the attention of newly appointed Directors of Education and may form part of the discussion during the mentor-coaching process or during the sessions held in conjunction with Public CODE meetings.

- Entry Processes and System Planning
 - Establish visibility and a shared vision for the system through wide ranging interviews and a review of current practices
 - Avoid reaction prior to investigating important issues
- Budget Process and Funding Formula
 - Develop a strong understanding and management of financial issues to ensure success as the Chief Executive Officer and Secretary of the Board
- Governance Models and Political Skills
 - Ensure effective relationships with trustees through political acumen and policy and procedure differentiation

- OLF and Ministry of Education Goals and Initiatives
 - Role model for Supervisory Officials and School and System Leaders policy expectations of the board and the province
- Establishing Networks with Other Directors of Education
 - Combat isolation, balance workload, develop strategic alliances, and establish “expert” resources for specific issues

The following topics are also recommended for discussion.

- | | |
|--|--|
| ▪ Improvement of Student Achievement | ▪ Facilities |
| ▪ Strategic Planning and Action | ▪ Human Resources |
| ▪ Board Politics | ▪ Capital Renewal |
| ▪ Organizational Structures | ▪ Transportation |
| ▪ System Planning | ▪ School Closure/Consolidation |
| ▪ Alignment of System Initiatives | ▪ Declining Enrolment |
| ▪ Community Profile and Engagement | ▪ Staff Complements |
| ▪ School and Student Success | ▪ Community Relations |
| ▪ Change and Change Management | ▪ Communications and Media Relations |
| ▪ Relationship with Administrative Assistant | ▪ Micro and Macro Management |
| ▪ Relationship with Employee Groups | ▪ Supervisory Official Performance Appraisal |
| ▪ Relationships with Ministry of Education | ▪ Capacity and Team Building |
| ▪ Relationship with Provincial Organizations | ▪ Focusing on Teaching, Learning, Program, and Instruction |
| | ▪ Alternative Thinking Strategies |

REFERENCES OF SPECIFIC INTEREST TO DIRECTORS OF EDUCATION

WEB-BASED MENTORING REFERENCES

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A DISTANCE MENTORING APPROACH

As in any effective mentoring relationship, the distance mentoring partners should let the proven process guide their mentoring relationship:

- Negotiating agreements;
- Building the relationship;
- Developing the mentee; and
- Ending the relationship.

Distance mentoring can be satisfying and rewarding, but will be different from local mentoring. Distance mentoring poses additional challenges for two reasons. First is the obvious one of having to do most of the communicating without being face-to-face. Second is the fact that supervisory officers in remote regions, such as in the far north of Ontario, work in jurisdictions with very different realities than supervisory officers in more urban locations, e.g., Southern Ontario.

1. Negotiating Agreements – Commitment is Imperative

- Getting a commitment is critically imperative in a distance mentoring relationship. The Director of Education should ensure that there is willingness on behalf of the mentee to be involved in the OPSOA mentor/coach distance program and to fulfill all necessary requirements of the program.
- The mentor-coach should talk openly about the commitment required to develop the partnership, the increased challenge of working together at a distance, and the additional effort required to stay in touch. Identify the added challenges created by the distance, such as scheduling meetings, type of meetings, and developing the relationship.
- Agree on how the partnership will fulfill the requirement of the equivalent of six face-to-face meetings including when, how, and what to communicate with each other. Schedule regular meetings.
- Ensure the appropriate technological infrastructure (e.g., Skype, FaceTime) is in place at the start of the partnership and that both mentor-coach and mentee have access and skill to use the technology.
- Agree on the means of communication. Since seeing each other while “meeting” makes such a huge difference in building the relationship, insist on electronic “face-to-face” meetings through video teleconference “meetings”. Doing so will help avoid the “meetings” that take place while the mentee is in the car driving – a common occurrence given that supervisory officers in remote areas are on the road so frequently.
- Renew the discussion whenever necessary to help plan the meetings and keep the commitment fresh.
- Make sure each partner leaves the meeting with the same understanding of what has transpired, what each must do next, and confirm the next meeting date.

2. Building the Relationship

- As in all mentoring relationships, it is imperative to build the relationship by developing trust, familiarity and comfort.
- Try for at least one face-to-face meeting. Nothing is as effective as face-to-face meetings. Agree that if and when the mentee comes to a location accessible by the mentor, that a face-to-face meeting will be arranged if at all possible. Make every effort to be together at least once.
- If no other way of being together is possible, plan for at least one site visit.
- If necessary, start by sharing pictures of each other as it helps to know what each other looks like.
- Distance meetings should be scheduled with the time reserved for that meeting by both partners. Avoid phone meetings while on route elsewhere.
- Distance meetings require greater discipline and enhanced listening skills. Eliminate distractions, avoid interruptions, and listen actively. Sharpen sensitivity to tone of voice and listen to subtle nuances. Check for understanding and reactions.
- Take notes to help stay focused and to help refresh memory for the next meeting.
- Be patient as the relationship may grow at a slower pace than would be expected in a face-to-face relationship.
- Extra consideration should be given to matching the mentor-coach with the distant mentee. Where possible use mentor-coaches with some experience in similar small, remote boards.

3. Supporting Mentee's Learning Plan

- Identify mentee's goals and learning needs. Review regularly.
- Do research. Mentor understanding of the system culture, goals, and priorities of the mentee's context is a prerequisite for ensuring the building of individual leadership capacity. The mentor can learn much about the mentee and the work context by searching the website of the Board, Google search the mentee's name to learn of other involvements, and following local news from the area.
- Leverage networks. Try to establish a network of newly appointed supervisory officers in areas within the same region whenever possible.
- Put the mentee in touch with key people in other jurisdictions as well as other professionals.
- Communicate frequently between meetings. Be spontaneous to communicate between phone meetings, exchange emails, and interesting articles.
- Be available to the mentee between meetings.
- Offer a safe haven where mentee can work through issues and concerns in confidence, analyze options, and problem solve for effective action. Doing so helps to reduce isolation and increase confidence and skill.

4. Ending the Relationship

- Have a final evaluation of the program and encourage frank discussions and suggestions for improvement. If there is no opportunity for such a discussion, require the mentee to submit to the mentor a completed evaluation form in writing.

- Celebrate successes when bringing closure. Notes, email, sending small gifts, and even an extra phone call all work as pleasant reminders of the commitment to the relationship.

Distance mentoring is still in the developmental stage. There is ongoing need and opportunity to experiment and to create effective practice.

Accomplishments should be celebrated.

TECHNOLOGY APPLICATIONS FOR MENTORING AND COACHING

The OPSOA Mentoring and Coaching Program has relied upon face-to-face meetings as the most significant method of interaction between the mentor-coach and the mentee. Although the program has been very successful, new technologies offer new opportunities. These have the potential to break down the geographic and time barriers, while increasing and/or enhancing the interactions in a cost-effective manner.

With the rapid pace of technological advancement and increasing ease of use, mentor-coaches and mentees should discuss how technology can complement their relationship and create greater opportunities for communication. Depending on what technologies are available to both, they should determine the best way to proceed.

It is not intended that technology replace the traditional face-to-face meetings but where appropriate it should be used to enhance and facilitate the mentoring and coaching relationship. Examples such as Skype or FaceTime have proven to be very effective for some.

**APPENDIX A:
TRAINING AND SKILLS DEVELOPMENT**

TRAINING AND SKILLS DEVELOPMENT

PROCESS FOR MENTORING AND COACHING

WHAT TO DO	HOW TO DO IT
Invest time and effort in setting the climate for learning	Determine mentee's learning style and learning needs.
Be sensitive to the day-to-day needs of the mentee	Spend time connecting with the mentee. Ask enough questions to gather sufficient insight into the mentee's work context.
Identify and use multiple venues for communication	Explore all available options: face-to-face, email, videoconference, web-based technologies, telephone, and emerging technology and use more than one.
Set a regular contact schedule, but be flexible	Agree on a mutually convenient contact schedule. When changes arise, use the communication to renegotiate time as an opportunity for connection and interaction.
Check on the effectiveness of communication	Ask questions: Are we connecting? Is the means we are using working for us? Is it convenient?
Make sure that connection results in meaningful learning	Is learning going on? Is the mentee making progress?
Share information and resources-but never as a substitute for personal interaction	Set the stage to share information and provide timely follow-up.

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STRATEGIES AND CONSIDERATIONS FOR INITIAL CONVERSATIONS

TO DO LIST	STRATEGIES FOR CONVERSATION	MENTOR-COACH CONSIDERATIONS
Take time getting to know each other	Exchange bios. If these are not easily available, create them through conversation.	Establish rapport. Exchange information. Identify points of conversation.
Talk about mentoring	Ask: Have you ever before been engaged in a mentoring and coaching relationship? What did you learn from that experience?	Talk about your own mentoring and coaching experiences.
Determine the mentee's goals	Ask: What do you want to learn from this experience? Give the mentee an opportunity to articulate broad goals.	Determine if the mentee is clear about his/her own goals and objectives.
Determine the mentee's relationship needs and expectations	Ask: What do you want out of the relationship?	Be sure you are clear about what your mentee needs or wants from this mentoring and coaching relationship. If you are not, encourage the mentee to think through what he or she wants from the relationship.
Define the deliverables	Ask: What would success look like for you?	Do you have an area of experience or expertise that is relevant to this person's learning goals?
Share your assumptions, needs, expectations, and limitations candidly	Ask for feedback. Discuss the implications for relationship.	What you are willing and capable of contributing to the relationship?
Discuss options and opportunities for learning	Ask: How would you like to go about achieving your learning goals? Discuss learning and communication styles. Ask: What is the most useful kind of assistance I can provide?	Discuss implication of each other's styles and how that might affect their relationship.

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GENERIC SKILLS FOR MENTOR-COACHES

BROKERING RELATIONSHIPS	The relationship involves making contacts and identifying helpful resources for mentees through a well-developed network.
BUILDING AND MAINTAINING RELATIONSHIP	The mentor-coach should model a high ability to both build and maintain relationships.
COACHING	The mentor-coach assists the mentee to fill gaps in knowledge.
COMMUNICATING	The mentor-coach needs to build trust, listen, check for understanding, and articulate clearly.
ENCOURAGING	The mentor-coach cheerleads, builds confidence, inspires, and motivates the mentee.
FACILITATING	The mentor-coach builds the climate for learning while the mentee is involved in the process of design implantation and evaluation of the learning.
GOAL SETTING	The mentor-coach helps the mentee clarify and set realistic goals.
GUIDING	The mentor-coach models learning, assists the mentee to maintain focus, and provides opportunities for reflection.
MANAGING CONFLICT	The mentor-coach assists the mentee to understand the varying points of view in a conflict.
PROBLEM-SOLVING	The mentor-coach engages the mentee in solving problems. He/she guides rather than directs the process.
PROVIDING AND RECEIVING FEEDBACK	The mentor-coach provides and receives constructive feedback.
REFLECTING	The mentor-coach models the skills of reflection for the mentee. Mentor-coach and mentee should be able to step away from a situation, assess the learning needs that are highlighted, and take action.

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SKILLS REQUIRED FOR CROSS-CULTURAL MENTORING AND COACHING: MENTORING AND COACHING CANDIDATES OUTSIDE YOUR FORMER BOARD

REFLECTIVE LISTENING (USING THE SKILLS OF ATTENDING, CLARIFYING AND CONFIRMING)	You may need to listen more closely for different definitions, acronyms, or organizational structures.
CHECKING FOR UNDERSTANDING AND CULTURAL AWARENESS	Some practices and organizational structures will be different. Check that you understand the differences between the mentee's experience and your own.
PROVIDING AND RECEIVING FEEDBACK	Continue to provide feedback in a neutral way.
MAINTAINING GLOBAL PERSPECTIVE	Despite small differences in policy or practice, all school boards operate under the same Acts and Regulations. As well, challenges are similar from board to board.
READING BETWEEN THE LINES (KEYING INTO FEELINGS)	The mentee may need encouragement to explain more fully his/her personal response to a situation.
SUSPENDING JUDGMENT	As a mentor-coach, your role is not to evaluate the mentee or the board in which he or she works.
EXERCISING CULTURAL FLEXIBILITY	Every culture is different. Model the ability to adapt for the mentee.
CREATING CULTURALLY APPROPRIATE NETWORKING OPPORTUNITIES	Encourage the mentee to understand network in his/her own context, but encourage the mentee to engage others beyond his/her board.
MODIFYING COMMUNICATION STYLE TO ACCOMMODATE CULTURAL DIFFERENCES	Some boards may be more hierarchical than others in communication. Some may appear more or less casual than your previous experience. All are relevant to the context of the board.
SENSITIVITY TO VARYING CULTURAL PERCEPTIONS TO TIME, SPACE, AUTHORITY AND PROTOCOL	The mentee may be in a very different organizational structure than you have lived. Depending on the resources of the board and the leadership, there will be different ways of interacting, different human or physical resources available for the mentee.

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PROVIDING FEEDBACK TO YOUR MENTEE

WHAT TO DO	HOW TO DO IT	EXAMPLE
Provide feedback about behaviour that the mentee can do something about	Stay with the mentee's behaviour rather than succumb to the temptation to evaluate it	"I have a few ideas that might help..." "What works for me is..."
When you talk from your perspective, remember that your reality is not the mentee's reality	When you talk about your own experience, set a context and be descriptive so the mentee can see parallels	"In my experience which was...I found that...I know that is not your situation, but maybe there is something to learn here."
Check out your understanding of what is being said	Listen actively Clarify and summarize	"If I understand what you are saying..." "Help me understand what you mean by..."
Use tone of respect	Take care not to undermine the mentee's self-esteem	"I liked the way you..." "I am curious..." "I wonder..." "Have you ever considered ..."
Be aware of your communication style and how that works with that of your mentee	Share information about communication styles with your mentee and discuss the implication for the feedback cycle	"I find that I get defensive when..." "I react positively to..."
Avoid giving feedback when you lack adequate information	Ask for time to get the information you need Faking it doesn't work	"To be honest with you, I need to think about that a little more."
Encourage the mentee to experience feedback as movement forward rather than interruption from the journey	Continuously link progress and learning to the big picture and the journey	"When we started out...And then...And now..."

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CONFIDENTIALITY STANDARDS FOR MENTORS-COACHES

- What we discuss stays between us.

- I will not disclose information about you to supervisor, unless you consent.

- After our formal mentoring and coaching relationship has ended we will maintain the confidential nature of the relationship.

- What we say between us stays there unless you give me permission to talk about it with others.

- Challenges in the relationship may be discussed with the Coordinator.

- It is okay to talk about what we talk about as long as it is positive.

- Other Ideas:

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DISCUSSION QUESTIONS FOR ON-GOING MEETINGS: REFLECTION REVIEW

Before each on-going meeting, take time to jot down responses to each of the questions below. Be prepared to share your responses with the group.

- Am I providing adequate support to facilitate the learning of my mentee?
- Do I use a variety of mentoring and coaching opportunities? e.g. teleconference, videoconference, face-to-face, and email.
- Have we identified sufficient and varied opportunities and venues for learning?
- Are we continuing to build and maintain a productive relationship?
- Are we continuously working on improving the quality of the mentoring and coaching interaction?
- Are we continuing to work at maintaining the trust in this relationship?
- Is the feedback I am giving thoughtful, candid, and constructive?
- Do we make time to reflect on our partnership regularly?
- Are there lurking dangers or subjects too difficult to discuss in the mentoring and coaching relationship?

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MID YEAR "CHECK"

1. Outcomes: Entry Planning
 - i. Results from Entry Planning Process
 - ii. Assessing the Results
 - iii. Implications: "Creative Urgency"

2. Outcomes: Relationships
 - i. Board/Trustees
 - ii. Executive Council/SOs
 - iii. School Level Admin.
 - iv. Board Office Staff
 - v. Federations/Non-Teaching Groups e.g. CUPE
 - vi. School Staff
 - vii. Exterior Groups e.g. Ministry, Media, Community
 - viii. Assessing the Relationships
 - ix. Implications: "Creative Urgency"

3. Response: System Planning
 - i. "Working within the Creative Urgency Environment"
 - ii. New Directions
 - iii. Process and Timelines
 - iv. Implementation and Evaluation
 - v. "Going Public"

4. Other Areas for Discussion
 - i. What's Hot/What's Not
 - ii. "Irons in the Fire"
 - iii. Items from the Last Mentor/Mentee Meeting
 - iv. Further Items

5. Items for Next Contact
 - i. Follow-ups
 - ii. Dates and Times of Next Contact
 - iii. Possible Agenda Items

If you have emerging items that you need to introduce, please realize that they take priority and will be dealt with first.

LONG DISTANCE MENTORING AND COACHING INTERACTION: REFLECTION REVIEW

1. What went particularly well during our mentoring and coaching sessions?

2. What relationship challenges did we face?
 - Were we communicating effectively with each other?
 - Were we candid and open in our communication?
 - Did we take care to check out assumptions with each other?
 - Were we actively listening to each other?

3. What learning challenges emerged?
 - What did we do to hold ourselves accountable for the learning?

4. What logistical challenges affected our communication?
 - Were the venues (email, telephone, videoconference, meetings) we have selected working for us?
 - Were there external factors, such as time and access that affected our interaction in any way?

5. What three strategies could improve the quality of our mentoring and coaching interaction?

6. What is the action plan for implementing each of the three strategies?

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STRUCTURING LEARNING OPPORTUNITIES

Record ideas for the mentee to enhance learning. Ask yourself:

- What opportunities are available in-house?
- What is available outside the board?
- What kinds of opportunities exist to get exposure to new learning?
- What kinds of opportunities exist to reinforce new learning?
- What kind of opportunities exist that might accelerate learning?

Examples of learning opportunities:

- Professional Development in local district school board
- Professional Development by Ministry of Education
- Reading professional journals or reviewing professional websites
- OPSOA conference
- OPSOA website
- Online courses on for Superintendents and Directors of Education

LOCATION OF POSSIBLE LEARNING OPPORTUNITIES		PURPOSE OF POSSIBLE LEARNING OPPORTUNITIES		
IN-HOUSE	OUTSIDE THE OFFICE	TO GAIN EXPOSURE TO NEW LEARNING	TO REINFORCE NEW LEARNING	TO ACCELERATE LEARNING

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SOME FAVOURITE STRATEGIES FROM MENTOR-COACHES

1. Share the individual profiles of mentors and mentees that include experience, background, expertise, interests, and personal data.
2. Develop elements of the entry plan together and follow-up in future meetings.
3. Discuss preparations for the first administrative council/family of schools or department meeting. Review strategies for effective meetings.
4. Discuss the personal and provincial dynamics of board meetings, board sub-committee meetings, and various administrator meetings in order to help the mentee gain perspective and understand their role more quickly.
5. Discuss methods to familiarize oneself with schools, departments, superintendents, and principals. Develop best strategies to visits schools and other board facilities.
6. Discuss problem solving strategies.
7. Track issues discussed with mentee and use as a springboard for discussion.
8. Discuss the budget process across various portfolios.
9. Join with another mentor-coach and mentee team to discuss issues.
10. Use a reflective piece such as, “What Engages Employees the Most or, The Ten C’s of Employee Engagement” to support practices to encourage engagement.
<http://www.iveybusinessjournal.com/topics/the-workplace/what-engages-employees-the-most-or-the-ten-cs-of-employee-engagement#.UZ-GZtjWGV0>
11. Develop a personal short list of “experts” for the mentee to consult.
12. Encourage the mentee to network beyond the local board. Joining a Ministry committee, OPSOA, attending provincial, national and international in-service are all ways to expand the network of colleagues and support.
13. Choose an issue which has been on-going during the mentorship relationship. Ask the mentee to reflect on change in approach during the year. Ask for reflection on the ways the working relationship with principals has changed over the year.
14. Ask regularly, “What are you doing to improve student achievement?” “What are your principals/superintendents doing to improve student achievement?”

SOME FAVOURITE QUESTIONS FROM MENTOR-COACHES

1. What is your entry plan?
2. How do you focus your principals on their own goals?
3. How do you involve your principals/superintendents in problem-solving?
4. What keeps you awake at night?
5. Has there been a shift in your thinking since we last met?
6. How are you achieving balance in your life?
7. How would you do this differently another time?
8. If you could give advice to someone who is starting this position in September, what would that advice be?
9. What has surprised you about the role?
10. What one thing might you change about how you approached the role?
11. What has been the one area of greatest growth for you?
12. How has your leadership been different or the same as that of the SO's/Director you have had as a school administrator?

During the course of the year, log some of your favorite questions for mentees.

POTENTIAL ISSUES TO CONSIDER

Entry Plan

Understanding the Role of the SO

Working with Trustees

Management Skills

Relationships with Colleagues

Ontario's Leadership Framework

Conflict Resolution/Alternate Dispute Resolution

Dealing with the Media

Instructional Leadership

Learning Networks

Equity and Inclusion

Collection and Use of Data

Instructional Rounds

Labour Relations

**APPENDIX B:
FORMS AND CHECKLISTS**

OPSOA MENTOR-COACH PROFILE

Name: _____

Date: _____

Board: _____

Phone Number: _____

Email: _____

PROFESSIONAL EXPERIENCE
PORTFOLIO EXPERIENCES:
STRENGTHS/SKILL SET:
PROFILE OF BOARD(S) WORKED IN:
PRIORITIES AS A MENTOR COACH:
MENTORING COACHING TRAINING:
OTHER TRAINING:
ADDITIONAL INFORMATION/COMMENTS:

Signature

Date

OPSOA MENTEE PROFILE

Name: _____

Date: _____

Board: _____

Phone Number: _____

Email: _____

CURRENT PORTFOLIO:

DATE POSITION ASSUMED:

PERSONAL/PROFESSIONAL
STRENGTHS:

PERSONAL/PROFESSIONAL
AREAS OF GROWTH:

FIRST YEAR GOALS:

Signature

Date

MENTOR AND MENTOR-COACH AGREEMENT/CHECKLIST

- We have agreed on the following goals and objectives as the focus of this mentor coach relationship:

1. _____
2. _____
3. _____

- We have discussed the protocols by which we will work together. We will collaborate on the development of a learning plan.

- To ensure that our relationship is mutually rewarding, we agree to:

1. Meet regularly. Our specific schedule of contact and meetings, including additional meetings, is as follows:

2. Look for multiple opportunities and experiences to enhance the mentee's learning. We have identified, and will commit to, the following specific opportunities and venues for learning:

3. Maintain confidentiality of our relationship. Confidentiality for us means:

4. Honour the ground rules we have developed for the relationship. Our ground rules will be:

5. Provide regular feedback to each other and evaluate progress. We will accomplish this by:

- At the end of our agreed time together (the equivalent of one academic year), we will review this agreement, evaluate our progress, and reach a learning conclusion.
- The relationship will then be considered complete. If we choose to continue our mentoring partnership, we may negotiate a basis for continuation, so long as we have specified mutually agreed goals.
- Agreed exit process:
In the event one of us believes it is no longer productive for us to continue or the learning situation is compromised, we may decide to seek outside intervention or conclude the relationship. In this event, we agree to use closure as a learning opportunity.

LEARNING PLAN

Mentee:		Date Developed:
Mentor:		Dates Reviewed:
Mentoring Plan (e.g., frequency of meetings, possible meeting formats, and locations)		
Proposed Contact Schedule (record revisions as needed)		
Learning Priorities <i>(Reference the Ontario Leadership Framework 2012, BIPSA, BOARD Strategic Plan, Operational Reviews, Performance Plan goals and development activities, individual needs and interests)</i>		
DATE OF ENTRY	GOAL	RESOURCES, STRATEGIES AND NOTATIONS RELATED TO RESULTS/OUTCOMES, AND NEXT STEPS

PRIVATE LOG FOR MENTORS AND MENTEES

Experienced mentors track their interactions with mentees and ask the mentees to do likewise. This has been done both as a shared activity and independently. Either way, the log is a reminder of issues and a springboard to new learning for the mentee.

DATE	TOPIC	ALTERNATIVES	ACTIONS	OUTCOMES

**APPENDIX C:
RESOURCES**

RESOURCES FOR PRACTITIONERS

The following are some suggested readings for educators to improve their understanding of the issues in mentorship and coaching.

WEB-BASED RESOURCES

- Asbury, T. L. & Hackman, D. G. (2006). Learning from Experience: Initial Findings of a Mentoring/Induction Program for Novice Principals and Superintendents. http://www.aasa.org/uploadedFiles/Publications/Newsletters/New_Superintendents_E-Journal/April2009.pdf Contains a study of mentoring and induction programs for administrators in Iowa. Includes recommendations for design and implementation of mentoring programs.
- Beem, K. (2007). Superintendent Mentoring the State Way. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=6798> Describes the experience of a newly appointed superintendent in Massachusetts and outlines mentoring programs in six states in the USA.
- Berube, W., Neely, R. O. & Wilson, J. (2002). Developing the Entry Plan. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=9932&terms=Developing+the+Entry+Plan>. Provides the six steps necessary in an entry plan.
- Berube, W., Neely, R. O. & Wilson, J. (2002). The Entry Plan: A Systematic Transition to a New Superintendency. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=9886> Discusses the need for an entry plan for newly appointed superintendents.
- Brown, B. TED Talk: The Power of Vulnerability. Retrieved from http://www.ted.com/talks/brene_brown_on_vulnerability.html
- CODE Advisories: A series of helpful monographs developed by the Council of Ontario Directors of Education (CODE). Retrieved from http://www.ontariodirectors.ca/CODE_Advisories/CODE_Advisories.html
- Daresch, J. C. & Playko, M. A. (1993). Benefits of a Mentoring Program for Aspiring Administrators. Retrieved from Education Resources Information Centre http://www.eric.ed.gov/ERICWebPortal/search/detailmini.jsp?_nfpb=true&_ERICExtSearch_SearchValue_0=ED354603&ERICExtSearch_SearchType_0=no&accno=ED354603 The study concludes that the mentoring role is satisfying and that it can be a form of powerful professional development for the mentors.

- Daresh, J. C. & Playko, M. A. (1994). Planning Model for Local Administrator Mentor Program Development. Retrieved from http://www.eric.ed.gov/ERICWebPortal/search/detailmini.jsp?_nfpb=true&_ERICExtSearch_SearchValue_0=ED368036&ERICExtSearch_SearchType_0=no&accno=ED368036. Describes a planning model for school districts to use in planning administrator mentor programs.
- Daresh, J. C. & Playko, M. A. (1995). Mentoring in Educational Leadership Development: What Are the Responsibilities of the Protégés? Retrieved from http://www.eric.ed.gov/ERICWebPortal/search/detailmini.jsp?_nfpb=true&_ERICExtSearch_SearchValue_0=ED381874&ERICExtSearch_SearchType_0=no&accno=ED381874 Describes the skills and attitudes that mentees should bring to the mentoring relationship.
- Ertmer, P. A. (2003). Critical Characteristics of Professional Development Coaches: Content Expertise or Interpersonal Skills? http://www.edci.purdue.edu/ertmer/docs/MWERA_CoachChars.pdf The conclusion of the study of professional development coaches is that interpersonal skill is the most important characteristic of coaches.
- Haag, E. & Reeves, R. L. (2003). Now I Am One! "What do I do first?" A rookie superintendent asks his sage adviser. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=8964> Contains a sample first meeting conversation between a newly appointed superintendent and his mentor. Also lists the tasks required in a new superintendency.
- Leithwood, K. (2012). THE ONTARIO LEADERSHIP FRAMEWORK 2012 with a Discussion of the Research Foundations. Retrieved from http://iel.immix.ca/storage/6/1345688978/Final_Research_Report_-_EN.pdf Reflects two distinct approaches to the description of successful leadership practice.
- Lubinsky, L. (2002). Coaching our game - Guest Column - training of school principals and superintendents. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=10306&terms=coaching+our+game> The perspective of a retired superintendent who has become an executive coach.
- Matthews, J. (2002). Time Tested Counsel for Rookies. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=9934>. Contains advice to new superintendents from very experienced practitioners.
- Pardini, P. (2003). Executive coaching: a growing recognition of coach-client relationships in school leadership circles. *School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=8952>. Describes the advantages of executive coaching for school leaders.
- Parsons, C. (1999). Mentoring for Superintendents on Service Learning. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=14632>. Explains the concept of “elders” as part of a mentoring support group for a superintendent.

Peterson, D. (2003). Beyond peer coaching: a Superintendent's use of a critical friend leads first to pain but then progress. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=8956> Superintendent and mentor-coach use learning journals to document challenges and progress in the mentoring relationship.

Reiss, K. (2003). Why Coaching Matters: Identifying a leader's strengths and weaknesses, then acting collaboratively to move ahead. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=8954> Describes a program, "Leadership Coaching for School Change" which assists school leaders to improve their practice.

Sinek, S. TED Talk: How Great Leaders Inspire Action. Retrieved from http://www.ted.com/talks/simon_sinekshow_great_leaders_inspire_action.html

TED Talks: **TED (Technology, Entertainment and Design)** is a global set of conferences owned by the private non-profit Sapling Foundation, formed to disseminate "ideas worth spreading."

Tooms, A. K. (2003). Bringing in Mac: how an executive coach supported the socialization and training of a new principal. *The School Administrator*. Retrieved from <http://www.aasa.org/SchoolAdministratorArticle.aspx?id=8958> Describes the use of an executive coach for new principals. Defines the differences between coach and mentor.

The Institute for Educational Leadership. <http://www.education-leadership-ontario.ca/content/home>
The institute is committed to exploring leading-edge thinking on education leadership and applying that expertise to develop high-quality resources and learning opportunities for school, board and system leaders.

BOOKS

Abrams, J. (2009). *Having Hard Conversations*. Thousand Oaks, CA: Corwin Press. An interactive, personal approach to mastering the art of challenging conversations.

Acree Walsh, J. & Dankert Sattes, B. (2010). *Leading Through Quality Questioning*. US: Corwin Press. Not only does this book address self-inquiry for school leaders, it offers tools and learning support for leaders committed to improving and refining their inquiry-based leadership.

Albrecht, K. (2005). *Social Intelligence: The New Science of Success; Beyond IQ, Beyond EI, Applying Multiple Intelligence Theory to Human Interaction*. NY: Jossey-Bass. Describes the five dimensions of social intelligence.

Battley, S. (2006). *Coached to Lead: How to Achieve Extraordinary Results with an Executive Coach*. NY: Jossey-Bass. Describes coaching models, assessment, and action planning for executives.

- Bloom, G. et al. (2005). *Blended Coaching: Skills and Strategies to Support Principal Development*. CA: Corwin Press. Describes a variety of coaching methods including executive, instructional, collaborative, consultative, and transformational coaching.
- Brown, B. (2012). *Daring Greatly*. NY: Gotham Books. Dispels the cultural myth that vulnerability is weakness and argues that it is, in truth, our most accurate measure of courage.
- Cashman, K. (2008). *Leadership From the Inside Out: Becoming a Leader for Life*. (2nd ed.). San Francisco, CA: Berrett-Kohler.
This book serves as an integrated coaching experience that helps leaders understand how to harness their authentic, value-creating influence, and elevate their impact as individuals, in teams, and in organizations.
- Cook, M.J. (1999). *Effective Coaching*. NY: McGraw-Hill. A handy how-to handbook for a variety of coaching situations.
- Danelo Barbour, J. et al. (2012). *Leading in Complex Worlds*. San Francisco, CA: Jossey-Bass. A Volume in the International Leadership Association Series, Building Leadership Bridges.
- Fisher, R., Heen, S., Patton, B. & Stone, D. (2000). *Difficult Conversations: How to Discuss What Matters Most*. New York, NY: Penguin Books. Answers to the 10 most frequently asked questions about difficult conversations.
- Fullan, M. (2013). *Stratosphere, Integrating Technology, Pedagogy, and Change Knowledge*. Pearson Canada Inc. Merges educational change with a deep understanding of the new technologies to present a powerful plan for rethinking and reinventing education.
- Griessman, B. E. (1994). *Time Tactics of Very Successful People*. US: McGraw-Hill. Describes the idea that successful people develop focused goals and put them in writing. Time is used to enhance these goals. Contains suggestions and tips for good time management.
- Hargreaves, A. & Fullan, M. (2012). *Professional Capital, Transforming Teaching in Every School*. NY: Teachers College Press. Combats the tired arguments and stereotypes of teachers and teaching and show us how to change them.
- Hunter, A. & Kiernan, H. G. (2005). *The Reflective Mentor: Case Studies in Creating Learning Partnerships*. Norwood, MA: Christopher-Gordon Publisher. A portion of the book describes the work at Seton Hall University with reflective mentoring for superintendents.
- Lawson, K. (2007). *Successful Coaching and Mentoring*. Barrons. Engaging, small format book with lists and charts for coaching and mentoring.

- Reeves, R. (2006). *What Every Rookie Superintendent Should Know: Surviving Year One*. Rowman & Littlefield Publishing Group. A conversational guide to surviving the first year in the job, while still focusing on student success.
- Sinek, S. (2009). *Start With Why*. New York, NY: Portfolio/Penguin. WHY is not about money or profit—those are results. WHY is the thing that inspires us and inspires those around us.
- Stone, F.M. (2007) *Coaching, Counseling and Mentoring*. (2nd ed.). NY: American Management Association. Defines coaching, counseling, and mentoring and provides examples of appropriate use of each strategy. Helpful in working in employee relationships.
- Zachary, L. J. (2000). *The Mentor's Guide: Facilitating Effective Learning Relationships*. NY: Jossey-Bass. This guidebook is used by principal associations in Ontario for mentor training.
- Zachary, L. J. (2005). *Creating a Mentoring Culture*. CA: John Wiley & Sons. From the author of the best-selling *The Mentor's Guide* comes the next-step mentoring resource to ensure personnel at all levels of an organization will teach and learn from each other.

ARTICLES

- Aronica, L. & Robinson, K. (2009). *The Element: How Finding Your Passion Changes Everything*. New York, NY: Viking.
- Crim, D. & Seijts, G. H. (2006). What Engages Employees the Most or, The Ten C's of Employee Engagement. *Ivey Business Journal*.
- Flowers, B. S., Jaworski, J. & Senge, P. (2004). *Presence: An Exploration of Profound Change in People, Organizations and Society*. NY: Random House.
- Freeze, D. & Wheatley, M. (2011). *Walk Out, Walk On: A Learning Journey into Communities Daring to Live the Future*. Berrett-Koehler Publishers. The authors invite you on a learning journey to seven communities around the world to meet people who have walked out of limiting beliefs and assumptions and walked on to create healthy and resilient communities.
- Kimsey-House, H., Kimsey-House, K., Sandahl, P. & Whitworth, L. (2007). *Co-Active Coaching: New Skills for Coaching People Towards Success in Work and Life*. (2nd ed.). Palo-Alto, CA: Davies-Black.
- Laskow Lahey, L. & Kegan, R. (2009). *Immunity to Change: How To Overcome It And Unlock Potential In Yourself And Your Organization*. Boston, MA: Harvard Business Publishing.
- Pink, D. (2010). *The Surprising Truth About What Motivates Us*. New York, NY: Riverhead Books.
- Rock, D. (2006). *Quiet Leadership: Help People Think Better-Don't Tell Them What to Do*. New York, NY: HarperCollins.
- Scott, S. (2009). *Fierce Leadership*. NY: Broadway Business.

- Seligman, M. (2002). *Authentic Happiness: Using the new psychology to realize your potential for lasting fulfillment*. New York, NY: Simon and Shuster Inc.
- Siegel, D. (2010). *Mindsight: The New Science Of Personal Transformation*. Daniel Siegel. New York, NY: Bantam Books.
- Suggett, N. (2006). *Time for Coaching*. National College for School Leadership Research Associate Report.
- Teitel, L. (2006). *Supporting School System Leaders: The State of Effective Training Programs for School Superintendents*. The Wallace Foundation. Contains a study of superintendent mentoring and coaching in 23 programs in the United States.

ONTARIO MINISTRY OF EDUCATION RESOURCES SUMMARY

IDEAS INTO ACTION FOR SCHOOL AND SYSTEM LEADERS

Ontario. Ministry of Education. (Spring 2010, updated March 2013). *Promoting Collaborative Learning Cultures: Putting the Promise Into Practice. Ideas Into Action*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

Ontario. Ministry of Education. (Winter 2010/11– updated March 2013). *Setting goals: The Power of Purpose. Ideas into Action*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

Ontario. Ministry of Education. (Fall 2009, updated March 2013). *Five Core Capacities of Effective Leaders. Ideas Into Action*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

Ontario. Ministry of Education. (Winter 2009-10, updated March 2013). *Engaging in Courageous Conversations. Ideas Into Action*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

Ontario. Ministry of Education. (Fall 2011, updated March 2013) *Using Data: Transforming Potential into Practice. Ideas Into Action*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

Ontario. Ministry of Education. (Fall 2012). *Aligning Resources with Priorities: Focusing on What Matters Most*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/IdeasIntoAction.html.

IN CONVERSATION

Ontario. Ministry of Education. (Fall 2008). *Leading Change – An Interview with Michael Fullan. In Conversation*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/InConversation.html.

Ontario. Ministry of Education. (Winter 2009). Values-Driven Leadership. *In Conversation*. Available at www.edu.gov.on.ca/eng/policyfunding/leadership/InConversation.html.

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ONTARIO LEADERSHIP FRAMEWORK 2012

1. The Ontario Leadership Framework 2012, A School and System Leader’s Guide to Putting Ontario’s Leadership Framework into Action.
2. The Ontario Leadership Framework 2012 with a Discussion of the Research Foundations prepared by Kenneth Leithwood.

Electronic copies available at www.education-leadership-ontario.ca