Mentorship: A Key to Effective Succession Planning

Slide 1 – Mentorship: A Key to Effective Succession Planning

Presented by CalHR's Statewide Workforce Planning and Recruitment Unit

Erica Salinas, Analyst

Danielle Metzinger, Analyst

Slide 2 – Training Objectives

Define mentorship and its benefits

Explain how mentorship supports effective succession planning

Step-by-step instruction on how to develop a mentorship program

Examples and resources available to you

Slide 3 – Mentorship Definitions

Mentorship: relationship with the goal of professional and personal development

Mentor: experienced individual willing to share knowledge, advice, and insight; serves as an adviser for a fixed period of time

Mentee: individual who agrees to be advised, trained, or counseled by a mentor for a fixed period of time

Slide 4 – Why Mentoring?

See the United States Office of Personnel Management's video about mentorship

Slide 5 – Organizational Benefits of Mentorship

Attractive to prospective employees

Helps bridge the "generation gap" in the workplace

Breaks down barriers within the organization

Encourages communication and trust

Transfer valuable knowledge

Slide 6 – How is Mentorship Related to Succession Planning?

Develops employees through relationship with department leaders and experts

Real-world knowledge and guidance needed to become a leader/expert

Voluntary, organic means for knowledge sharing and career support

Offered to all interested employees

Slide 7 – How Does Mentorship Fulfill Succession Planning Needs?

Target needs in succession risk areas

Consider using readiness assessments to determine needs

Variety of development activities based on leadership competencies

Slide 8 – How Can My Department Develop a Mentorship Program?

Four Phases to Develop a Mentorship Program

Developing a mentorship program takes place in the following four phases.

Phase 1: Establish Strategic Direction

       Phase 1, Step 1: Gain executive and stakeholder support

       Phase 1, Step 2: Develop steering committee

       Phase 1, Step 3: Develop program

Phase 2: Establish Participants

       Phase 2, Step 1: Market the program

       Phase 2, Step 2: Select participants

       Phase 2, Step 3: Conduct orientation

Phase 3: Implement

       Phase 3, Step 1: Establish developmental goals

Phase 3, Step 2: Manage participant involvement

Phase 3, Step 3: Conduct midterm assessment

Phase 4: Evaluate, Conclude, Maintain

Phase 4, Step 1: Evaluate program

Phase 4, Step 2: Conclude program

Phase 4, Step 3: Maintain program momentum

Phase 4, Step 4: Administer program improvements

Slide 9 – Phase 1: Establish Strategic Direction

Step 1: Gain executive support

Conduct risk assessment

Develop program concept

Step 2: Develop steering committee

Step 3: Develop program

Align to strategic plan

Conduct needs assessment

Create project plan

Develop program components

Slide 10 – Rally Support

Gain executive and stakeholder support

Support is continuous: gain and maintain

Build a business case showing the need for a mentorship program

Slide 11 – Step 1: Gain Executive Support

Conduct risk assessment

Gather workforce data

Gather exit survey data

Stakeholder/division/employee input

SWOT analysis

Business need context

Develop program concept/project plan

Slide 12 – Step 2: Develop Steering Committee

Executive Sponsor: Ownership, oversight and guidance, resources for success

Mentorship Program Manager: Facilitation, coordination, develop goals and strategies

Human Resources: Information, partnership

Training Officer: Support training needs

Division/Program Managers: Commitment, input, encouragement and support

Frontline Supervisors: Identify skill and knowledge gaps, encouragement and support, input

Employees: Self-assess knowledge base, support, provide feedback

Slide 13 – How do I Focus the Program?

Align to strategic direction

Review department and division strategic plan, mission, vision, values, objectives

Division critical functions

Survey stakeholders

Complete an environmental scan/SWOT analysis

Slide 14 – Where do I Begin?

Establish priorities

Survey divisions for skill gaps, critical needs

Review workforce data

360* Survey

Gather employee feedback

Slide 15 – How do I Organize this Effort?

Create a Project Plan including steps to complete each task and responsible person(s) assigned to each task

Slide 16 – What is Involved in a Program?

Develop Program Components

Purpose and goals

Mentor/mentee roles and responsibilities

Target participants

Benefits

Slide 17 – Mentor and Mentee Benefits

Mentor Benefits:

Personal fulfillment from helping and shaping others

Impacting others

Share knowledge about the organization

Continuity, projects carry on beyond your time there so the organization can benefit

Validation of knowledge and experience

Leadership skill development

Prove yourself, place in the pipeline

Broaden base of leadership philosophy

Mentee Benefits:

Prove yourself

Exposure to leadership

Insight to make career decisions

Networking

Cultural exposure and appreciation

Gaining knowledge

Experience with a "safety net", guidance while experiencing something new

Exposure to new areas and types of work, finding "fit"

Slide 18 – Program Type

Formal program:

Structured

Oversight of relationships

Clear and focused participant goals

Matching criteria

Open to all or specific group

Specific end date

Informal program:

Loosely structured

Minimal to no relationship oversight

May or may not have focused goals

No matching criteria

Open to all or specific group

May not have an established end date

Slide 19 – How do I Determine Program Type?

Formal program:

Objectives are focused

More time commitment required

Higher amount of oversight over mentoring relationships

Fits a more formal culture

Informal program:

Objectives are broad

Less time commitment required

Lower amount of oversight over mentoring relationships

Fits a more informal culture

Group size depends on resources available

Survey employees

Pilot program to build greater interest

Slide 20 – Program Type Examples

Formal or informal program?

Target Participants: Whole department (3,000 employees). Objective: General knowledge transfer.

Target Participants: 300 analysts. Objective: Close gaps in skills and abilities identified by each analyst.

Target Participants: 50 engineers. Objective: Developing interpersonal skills.

Slide 21 – Develop Program Components

Method to select and match participants

Participant tracking method

Initiatives and activities

Marketing/communication plan

Midterm assessment method

Resolve program issues

Contingency plan for mentorship mismatch

Final Evaluation method

Program policies, tools, and resources

Slide 22 – Approval

Ensure you have approval from leadership to move forward with the mentorship program

Slide 23 – Phase 2: Establish Participants

Step 1: Market the program

       Conduct information session

Step 2: Select participants

       Selecting mentors

       Selecting mentees

       Matching

Step 3: Conduct orientation

Slide 24 – Step 1: Market the Program

Participation in the program is voluntary

Purpose of the program

Target participants

Summarize benefits to mentors and mentees

Date of Informational Session(s)

Communicate participation goal

Slide 25 – Information Session

Provide prospective mentors and mentees with enough information so they can make an informed decision about participating in the program

Slide 26 – Step 2: Select Participants

Mentor Qualities:

       Knowledgeable

       Willing to share time and resources

       Sufficient communicator

       Non judgmental

       Global perspective (department, job); experience with the department, invested time in the department

Ethical

Inspiring

Empathetic

Able to teach

Available

Mentee Qualities:

Desire to learn

Flexible

Open minded

Enthusiastic

Initiative, driven

Ethical

Able to accept constructive criticism and feedback

Slide 27 – Relationship Types/Matching

Collect information from participants:

Experiences and developmental goals

Classification level

Desired classification

Reverse mentorships

Self-matched

Personal Characteristics

Peer Mentoring

Situational Mentoring

Slide 28 – Phase 3: Implement

Step 1: Manage participant involvement

Participant tracking

Maintain Engagement

Step 2: Conduct midterm assessment

Slide 29 – How do I Keep Participants Engaged?

Participants should not be expected to completely self-direct their participation

Crucial for program coordinators to continue encouraging engagement throughout the span of the program

Offer short trainings and workshops, facilitate group activities, distribute literature/videos, explain the benefits of mentoring, provide mentoring tools and techniques, and share testimonials

Slide 30 – Phase 4: Evaluate, Conclude Maintain

Step 1: Evaluate program

Step 2: Conclude cohort

Debrief participants

Closing ceremony

Step 3: Administer program improvements

Step 4: Maintain program momentum

Slide 31 – Step 1: Evaluate Program

Participant Evaluation

Focus Groups

Survey control and experimental group

Analyze business results

Analyze workforce data

Assess lasting impact

Slide 32 – How do I Bring Closure to the Program?

Debrief Participants

Benefits from the experience

Challenges of the experience

Lessons learned

Suggestions for improvements

Most enjoyable activities and strategies

Ending or transitioning the mentorship relationships into a maintainable source of guidance and support

Slide 33 – Closing Ceremony

Conclude the program with a "graduation" or closing ceremony to celebrate participation in the mentorship program

The closing ceremony should:

Express appreciation for all participants.

Highlight positive outcomes of the program.

Give participants the opportunity to share success stories.

Encourage participants to continue mentorship relationships

Invite the Executive Sponsor and other senior leaders to speak at the closing ceremony so they can express support for the program and congratulate participants.

Awards can be presented to honor time and commitment (e.g.: certificates, books)

Slide 34 – Mentorship Program Examples

CalPERS Mentoring Toolkit

United States Office Of Personnel Management Mentoring Guide

National Institute of Health Mentoring Information

Slide 35 – Contact Information

Email: wfp@calhr.ca.gov

Phone: (916) 322-0742