

Mentorship: A Key to Effective Succession Planning



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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

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

Why Mentoring?

- See the United States Office of Personnel Management's [video](#) about mentorship

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

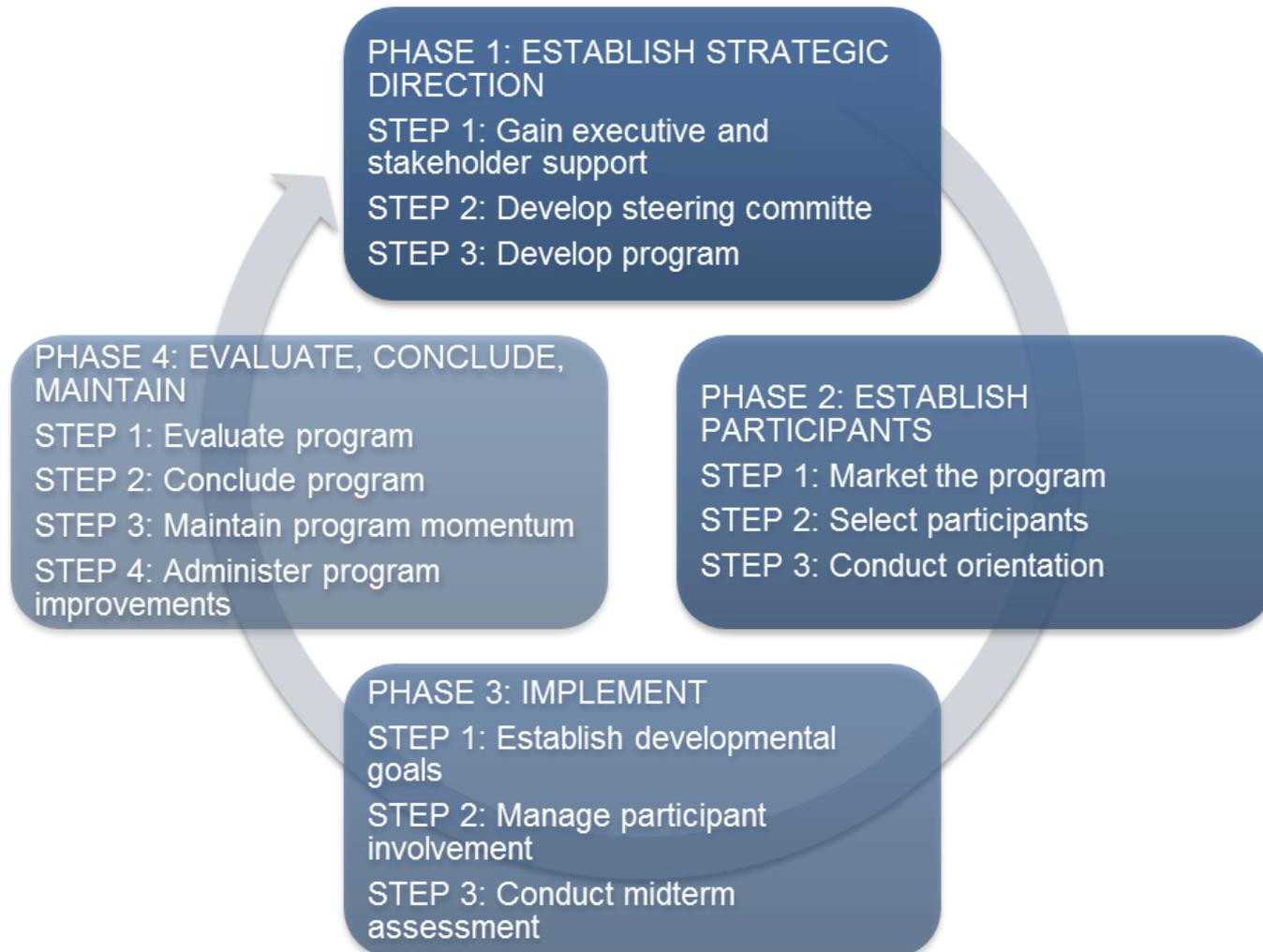
How is Mentorship Related to Succession Planning?

- 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

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

How Can my Department Develop a Mentorship Program?



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

Rally Support

- Gain executive and stakeholder support
- Support is continuous: gain and maintain
- Build a business case showing the need for a mentorship program

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

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

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

Where do I Begin?

Establish priorities

- Survey divisions for skill gaps, critical needs
- Review workforce data
- 360* Survey
- Gather employee feedback

How do I Organize this Effort?

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

What is Involved in a Program?

Develop Program Components

- Purpose and goals
- Mentor/mentee roles and responsibilities
- Target participants
- Benefits

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”

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

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

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.

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

Approval

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

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

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

Information Session

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

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

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

Phase 3: Implement

- Step 1: Manage participant involvement
 - Participant tracking
 - Maintain Engagement
- Step 2: Conduct midterm assessment

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

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

Step 1: Evaluate Program

- Participant Evaluation
- Focus Groups
- Survey control and experimental group
- Analyze business results
- Analyze workforce data
- Assess lasting impact

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

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)

Mentorship Program Examples

- [CalPERS Mentoring Toolkit](#)
- [United States Office Of Personnel Management Mentoring Guide](#)
- [National Institute of Health Mentoring Information](#)

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