Mentorship: A Key to Effective Succession Planning

Slide 1 – Mentorship: A Key to Effective Succession Planning
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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**

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