



**Reach Every Student: Supporting Effective  
System Leadership**

**Mentoring for Newly Appointed Directors of  
Education and Supervisory Officers  
Field Test Guide**

**Ministry of Education**  
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# 1. BACKGROUND

## 1.1 Mentoring<sup>1</sup> for Newly Appointed Directors of Education and Supervisory Officers

During the 2007-2008 school year the Ministry of Education conducted a provincial mentoring and coaching pilot for school and system leaders. In June of 2008, the government approved a province-wide rollout of Mentoring for Newly Appointed School Leaders. At the same time it was decided to expand Mentoring for directors of education and supervisory officers in 2008-2009 using a field test approach.

## 1.2 Overview of the 2008-2009 Field Test

Moving forward with Mentoring for directors of education and supervisory officers using a field test approach will provide the ministry and partners with an opportunity to build on the successes of the pilot phase and learn more about Mentoring for newly appointed system leaders. A capacity building approach will be integrated throughout the field test to encourage mentees and mentor to try out new ways of working together beyond one-to-one mentoring, for example, facilitated group mentoring. It will also provide an opportunity for the associations that represent system leaders in French language boards and their partner boards to work together to develop a framework for a provincial mentoring program and to implement approaches to mentoring that are designed to meet the unique development needs of their members.

For CODE, ECCODE and CODELF in particular, a critical question in the field test will be how to most effectively structure mentoring supports for new directors to meet their distinctive and diverse needs.

### 1.2.1 Research Foundations

The field test design and its essential parameters are informed by the results of the mentoring pilot evaluation and by Canadian and international research and experience with mentoring.

### 1.2.2 Purpose

The purpose of the field test is to provide an opportunity to identify and examine a variety of models of mentoring for new directors of education and supervisory officers within their first two years in the role. The field test approach will include a capacity building component to help mentor and mentee pairs explore ways to maximize the benefits of their mentoring relationships.

The field test will allow the ministry and partners to:

- take a closer look inside the mentoring process to find out more about the links between individual and organizational development needs,
- identify how needs of system leaders change over time within a two-year timeframe, and
- learn more about the unique needs of new directors of education and supervisory officers and ways of meeting them through mentoring

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<sup>1</sup> For the purposes of this field test guide, coaching is considered to be an integral part of Mentoring.

Specifically the field test will focus on exploring and documenting:

- how mentoring needs are defined
- what the expressed mentoring needs are
- how mentoring is used to meet identified needs
- key elements of the mentoring process and its content that need to be ensured; i.e., the role of the Leadership Framework and the Leadership Self-Review Tool (LSRT)
- results of the mentoring process including its benefits and challenges
- options for addressing challenges
- needs that could not be met through mentoring, and
- alternative options for addressing unmet needs.

In addition to examining the actual mentoring activity there will be an exploration of how the overall Mentoring is organized to determine what the associations can do together and what they need to do separately to ensure the distinct needs of their system and members are met; for example the faith dimension of the Catholic school system and the minority environment in French language boards.

The findings of the field test may also shed light on the relationship between Mentoring and other leadership development strategies and supports to ascertain linkages that help ensure that mentoring investments yield the greatest benefits. The field test will also examine the relationship between Mentoring and other system leadership development strategies and supports provided by other partners including the Literacy and Numeracy Secretariat, Student Success/Learning to 18, the Learning Partnership's *Ontario Supervisory Officer Program on Leadership and Management* and the Institute for Education Leadership.

#### **1.2.4 Target Group**

Newly appointed supervisory officers and directors of education are eligible to receive mentoring within the first and second years in the new role.

#### **1.2.5 Evaluation Framework**

The ministry has contracted with Parker Management Consultants, Inc (PMC), an external evaluator to assess the Mentoring for Directors of Education and Supervisory Officers Field Test. PMC in consultation with the ministry and the organizations that participate in the field test will develop an evaluation framework for the mentoring approaches being implemented.

The purpose of the evaluation will be to determine the effectiveness and impact of the specific mentoring activities. It will not take into consideration the performance of the directors of education and the supervisory officers participating in Mentoring. Confidentiality of participants will be maintained at all times.

### **1.3 About this Field Test Guide**

This guide sets out the parameters of the Mentoring for Newly Appointed Directors of Education and Supervisory Officers Field Test and describes the application process for participation of supervisory officer and director of education associations and/or partner boards. It sets out the minimum requirements that associations and their partner boards must meet to access ministry funding for the duration of the field test. It also describes the process boards of education must follow to access funding from associations either to offer Mentoring on their own or in partnership with associations.

## 2. MENTORING AND SYSTEM LEADERSHIP

The ministry's vision paper *Reach Every Student: Energizing Ontario Education* paper acknowledges the special responsibility that principals have in implementing its core priorities – improving student achievement, closing the achievement gaps and building public confidence. The 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.

### 2.1 The Essential Role of System Leaders

It is widely recognized that the impact of supports provided to principals may have only a small-scale and possibly a non-lasting effect if the system context and those who provide system leadership are not considered. 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 on raising the bar and closing the gap of student learning.

### 2.2 Why Mentoring 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 supporting 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 pilot and now in the field test the ministry is promoting a standard approach to Mentoring, one that is shaped by a set of common parameters designed to ensure that features known through research and professional practice to be essential to quality mentoring are put in place.

For system leaders to fulfil 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 offices 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 they too need supportive conditions within the system in order to fulfil 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 and beyond. 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.

## 2.3 Context of Mentoring for 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 fosters school, school board and provincial collaboration and commitment to student success is essential to building and strengthening system leader capacity.

The first two years in a system leadership role are both rewarding and challenging. As newly appointed system leaders make the transition to their new role, they require supports tailored to their unique set of responsibilities. Mentoring has been found to be one of the most powerful approaches to supporting ongoing leadership development, one that embeds learning and growth in the realities of the work of the new system leader.

### 2.3.1 The Ontario Leadership Strategy

Mentoring is a cornerstone of the Ontario Leadership Strategy. It contributes to the vision of supporting student achievement and well-being by attracting and developing passionate and skilled leaders. The strategy is focused on both individual and organizational development, embedded in daily practice and refined through continuous learning. Fostering partnership and shared responsibility among schools, boards, the ministry and education partners is key to its success.

### 2.3.2 The Leadership Framework for Supervisory Officers

The Leadership Framework for Supervisory Officers identifies leadership practices and competencies that are known to have the greatest impact on student achievement. It represents the best thinking and experience of world-recognized experts in leadership and successful leaders in Ontario and around the world. The Framework has been adopted by the Institute for Education Leadership (IEL)<sup>2</sup> and embraced by education practitioners across the province. It is composed of two parts:

- Part one identifies leadership practices and competencies that are found through research and professional experience to have a positive impact on student achievement. Leader practices include actions, behaviours and functions while leader competencies include skills, knowledge and attitudes of effective leaders.
- Part two identifies system practices and procedures to support successful school leadership. Supervisory officers and directors of education play an essential role as champions of leadership development by putting in place high-impact supports.

More information about the Leadership Framework including availability of English, public, French language and Catholic versions can be found at the Institute for Education Leadership (IEL) website at <http://www.education-leadership-ontario.ca/home.shtml>. The IEL offers tri-level workshops that enable boards to gain a better understanding of the Leadership Framework and how it applies in practice.

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

## 3. REQUIREMENTS

### 3.1 Overview

In the 2008-2009 field test phase of Mentoring for Directors of Education and Supervisory Officers, the ministry will provide funding for Mentoring to director and supervisory officer associations who will play a lead role in partnership with school boards to ensure that the following minimum requirements for Mentoring are fulfilled:

- Submit an application to the ministry to provide Mentoring for the duration of the field test phase
- Offer mentoring to all eligible newly appointed supervisory officers and directors of education
- Establish and maintain a steering/lead committee (for boards this role may be one that is included in the mandate of an existing board steering/lead committee)
- Demonstrate partnership among associations and with other key stakeholders that provide programs of professional learning for educational leaders
- Identify goals for mentoring that focus on both individual and organizational development
- Develop implementation parameters
- Establish relationships with mentee school boards
- Provide quality mentoring:
  - Recruitment and selection of mentors
  - Preparation of mentors for the role
  - Orientation of mentees to mentoring and development of skills for mentoring and coaching conversations
  - Ongoing assessment of mentee learning needs
  - Matching mentors and mentees
  - Provision of an exit process
- Support mentors and mentees to use a learning plan/mentoring agreement
- Conduct monitoring and evaluation
- Support the field test evaluation team including arranging access to mentor/mentee pairs.

Associations and school boards are encouraged to customize specific components to take into account the number of newly appointed system leaders, the number of mentors available, and the individual needs of their members such as the challenges of geography.

They may also establish additional requirements for Mentoring that reflect the distinctive needs of their members; for example the faith dimension of the Catholic school system and the minority environment in French language boards. In particular the Mentoring provided must take into account the diverse and unique requirements of directors of education and of supervisory officers.

### 3.2 Field Test Application Process

To receive funding to provide Mentoring, associations in collaboration with school boards must submit an application to the ministry using the application form provided in Appendix C of this guide. Completed applications must show how the association's plan for implementing Mentoring addresses each of the minimum requirements listed in section 3.1. School boards that wish to design and manage their own Mentoring must ensure that the board-designed Mentoring meets the requirements of the field test. This includes the following:

- submission of a field test application through the applicable association
- fulfilling the ministry reporting requirements through the association and
- participating in any field test activities such as meeting with the field test evaluator and the ministry. (See section 5.0 of this guide for reporting requirements.)

### **3.3 Eligible Newly Appointed System Leaders**

All newly appointed supervisory officers and directors of education who are within their first and second years in the role are eligible to receive Mentoring during the 2008-2009 field test phase. This includes those who were appointed to their positions prior to the beginning of the field test phase begins in September 2008.

### **3.4 Mentoring Lead/Steering Committee**

The association and/or the school board, where the school board chooses to provide its own model of Mentoring must identify a Mentoring lead/steering committee to oversee the planning, implementation, and monitoring of Mentoring. The lead/steering committee is responsible for identifying goals, developing a Mentoring implementation plan and overseeing all aspects of the Mentoring provided. Note that for school boards, this lead role may be included in the mandate of an existing school board steering/lead committee that oversees Mentoring for teachers and school leaders.

### **3.5 Provincial Mentoring Framework and Partnerships**

It is expected that associations and their partner boards will work together with the ministry to develop a provincial framework for Mentoring. This will require the establishment of ongoing, meaningful partnerships among associations, school boards and other stakeholders that build on and strengthen existing networks and initiatives as outlined in the following:

- Partner with at least one other association/organization<sup>3</sup> throughout the duration of the field test
- Establish a process to make funding available to school boards that choose to provide Mentoring
- Ensure that the school board context of mentees is evident in the Mentoring provided; e.g., organizational priorities and goals,
- Establish a communication strategy with school boards of mentees that contributes to the overall Mentoring offered
- Work with other associations from time to time to support the delivery of quality mentoring through mutual capacity building; e.g. collaborative development of Mentoring resources, planning and delivery of professional learning of common need and interest
- Draw on the resources and expertise available through key partners including the Institute for Education Leadership and The Learning Partnership.

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<sup>3</sup> See lists of associations and other key partner stakeholders in Appendices D and E of this guide

### **3.6 Goals for Mentoring – Individual and Organizational**

Plans for Mentoring must include clearly articulated goals that link Mentoring with individual and organizational development and ensure alignment with the Ontario Leadership Strategy which is available at <http://www.edu.gov.on.ca/eng/policyfunding/leadership> and the Leadership Framework for Supervisory Officers which is available at <http://www.education-leadership-ontario.ca/resources.shtml/>.

To ensure that Mentoring is connected with what is happening in boards, the support of directors of education for Mentoring of supervisory officers is essential. This is particularly the case where Mentoring is provided by associations on behalf of boards and the mentors are partnered with mentees from other boards. To be effective requires that directors not only support mentoring but also understand the process.

### **3.7 Implementation Parameters**

Clear parameters for implementation must be identified and followed. These will be developed by the association and/or by the board taking into account local circumstances such as geography, demographics, number of newly appointed system leaders, and the number of mentors available. Some examples include:

- Whether to seek practicing and/or retired system leaders or executives who hold positions outside a school board context as mentors
- Providing one-to-one and/or whole group mentoring, face-to-face and/or distance supports such as Adobe Connect, SharePoint and web conferences
- How coaching will be integrated in the Mentoring provided and who will provide the coaching
- Offering professional learning for mentors and mentees on their own and/or with a mixed group of mentors and mentees; e.g., coordinated with existing professional learning offerings for directors of education and supervisory officers
- Encouraging relevant and appropriate forms of job-embedded and/or off-site mentoring
- Providing distance supports to address geographic constraints
- Specifying expectations for frequency and nature of contact as well as establishing minimum number of contact hours each month.

### **3.8 Quality Mentoring**

The features described in the following sections have been identified in the pilot and in the research as essential to the provision of high quality mentoring.

#### **3.8.1 Recruitment and Selection of Mentors**

A process for recruitment and selection of mentors that meets the unique needs and capacity of associations and boards must be established by the Mentoring lead. A careful application process that includes both selection criteria and an interview process will increase the chances for recruiting the best possible mentors. The process also lays the foundation for the subsequent mentor and mentee matching process.

Where appropriate, mentors and/or executive coaches from outside the educational system may be recruited to serve as mentors to meet the unique needs of mentees and/or circumstances of the cohort/system such as the following:

- o potential lack of mentors
- o specific learning needs of a mentee, in particular those of directors of education
- o skill development such as coaching conversations, working with trustees

### **3.8.2 Preparation of Mentors**

Establishment of requirements for preparation of mentors for the role is fundamental to the provision of quality mentoring. A program of mentor preparation begins with orientation to the role and continues with an ongoing program of professional learning supports that include opportunities to network with other mentors on a regular basis.

### **3.8.3 Orientation of Mentees to Mentoring**

Mentees also require orientation to Mentoring that includes a discussion of the role of the mentor and what the mentee can expect of the mentor. It should also provide an opportunity for both mentor and mentee to agree on how they will work together, the timing and frequency of interaction and the ways in which they will communicate.

Orientation is a process that begins with the first meeting of the mentor and mentee and continues until both partners have clarity about expectations held for the mentoring that will follow. First meetings can take place one-to-one or if it can be arranged in a small group setting of mentors and mentees or a combination of both. Small group collaboration can enrich the conversation and promote the establishment of a learning network beyond individual mentor and mentee pairs.

The orientation process launches the mentor and mentee partnership and provides the foundation for a program of ongoing professional learning. Mentoring is central to the learning and is enhanced by a menu of professional learning on topics of need and interest that can be experienced either by mentees on their own or with their mentors. Mutual learning opportunities for mentors and mentees help to provide focus for the mentoring relationships

Although mentoring relationships typically respond to the individual needs of mentees, the general expectation should be that as the professional repertoire of the mentee increases the nature of the relationship and advice and reflection will deepen accordingly.

The link with board priorities is an essential aspect of Mentoring. In addition, topics for discussion commonly identified by new system leaders include:

- o the entry plan and beyond
- o working with trustees
- o establishing credibility with other supervisory officers and principals
- o setting priorities,
- o succession planning
- o strategies for analysing and using data to inform goal setting
- o implementing strategies for improving student achievement, and
- o dealing with the media.

### **3.8.4 Assessment of Mentee Learning Needs**

An in-depth assessment of learning needs should take place at the beginning of the Mentoring relationship. This initial data informs mentee learning goals which are expected to evolve over time. Ongoing assessment of mentee learning needs must be integrated into mentor and mentee conversations so that the mentoring activity continues to be relevant and meet the current and most pressing needs of the mentee.

Particular attention must be paid to issues of confidentiality for directors of education and supervisory officers. Given the unique aspects of their roles which are distinct from one another as well as from those of school leaders, the need for privacy, discretion and mutual trust is of utmost importance for the mentoring relationship to be effective and the powerful benefits of mentoring to be realized. For this reason, records of needs assessments and other materials that inform the learning plan should be maintained as confidential and private documents.

### **3.8.5 Matching Mentors and Mentees**

The matching process for pairing mentors with mentees requires a carefully planned and thoughtful approach. Information about mentor expertise and mentoring preferences gathered through the mentor selection process will be useful in informing the matches. Essential in any match is an opportunity for the mentee to provide input. Where it is possible to arrange, mentees will benefit from meeting mentors in advance and having an opportunity to base their input on face-to-face interactions rather than solely on what is provided in print materials such as mentor résumés.

### **3.8.6 Provision of an Exit Process**

An exit process for re-matching the mentee with another mentor should be built into the matching protocols should the original match be unsuccessful. Both mentor and mentee must be familiar with the exit process and be assured that it is designed to protect the integrity and confidentiality of all individuals involved. The exit process must also take into account the possibility that mentees may want to conclude their mentoring supports before their two-year period of eligibility ends.

## **3.9 Mentee Learning Plan/Mentoring Agreement**

A mentee learning plan/mentoring agreement is essentially the agenda for mentoring that is developed by the mentee with support from the mentor. It is intended to provide structure and focus to the mentoring activity and be used to promote reflection on practice and identification of goals that inevitably will change over time. Associations and boards are encouraged to provide a template for mentees to use as the basis for individualizing their learning plan/Mentoring agreement (see Appendix B for a sample Learning Plan/Mentoring Agreement). The design and format can be left to the mentor and mentee to develop and draw on in ways the mentee finds useful. The plan should reflect the learning needs of the mentee, identified through the learning assessment described in Section 3.8.4 and will guide the work of the mentor and mentee. The mentor and mentee will review the plan on a regular basis to determine progress and identify and record any change in learning needs and interests of the mentee.

Again the issue of confidentiality is of utmost importance in the articulation of learning goals in the form of a plan. The plan is mentee authored and managed and must be respected as a vehicle to promote development not as a document to be used for the purpose of performance appraisal.

As part of the mentoring relationship, coaching also may take place. Coaching is provided on a short-term basis for the time required to achieve a specific learning goal. The mentor may provide coaching, or may seek the expertise of another experienced leader, either internal or external to the board, to provide coaching to the mentee. The mentee may also identify other coaching supports to address a specific learning need.

### **3.10 Monitoring**

The association and/or board is responsible for monitoring the Mentoring provided on an ongoing basis to determine whether it is meeting the needs of participants and achieving its intended goals. The board can then identify barriers and issues, and take quick action to address challenges and make adjustments as needed. The results of the monitoring may be used to help inform the reports associations are required to submit to the ministry.

### **3.11 Field Test Evaluation**

Field test lead organizations must agree to provide information to the contracted external evaluator to permit them to have access to the mentors and mentees involved in the field test. They must also agree to notify the mentors and mentees that they will be visited by the contracted evaluator from time to time in order to get first hand their perspectives on the impact and benefits of Mentoring.

# 4. ROLES AND RESPONSIBILITIES

## 4.1 Overview

In the Mentoring for Newly Appointed Directors of Education and Supervisory Officers Field Test, director and supervisory officer associations that apply to participate have the primary responsibility for reporting to the ministry on its implementation and related costs. Boards that partner with associations either to provide Mentoring on their own or to work collaboratively with associations in the delivery of Mentoring are required to provide associations with all information related to Mentoring requirements for inclusion in reports associations must submit to the ministry.

## 4.2 Roles and Responsibilities Chart

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

- √ = required
- X = consultation with appropriate director or supervisory officer association
- NA = not applicable

<b>Mentoring Field Test Activities</b>	<b>Association</b> (lead provider of Mentoring on behalf of Boards)	<b>Board</b> (provides own Mentoring)
Submit Application to Ministry & Receive Ministry Funding	√	<b>NA</b>
Submit Application to Appropriate Association (where applicable)	<b>X</b>	√
Receive & Submit Board Applications to Ministry (where applicable)	√	<b>X</b>
Receive Funding via Association (where applicable)	<b>X</b>	√
Provide Required Reports to Appropriate Association for Submission to the Ministry (where applicable)	<b>NA</b>	√ <b>X</b>
Submit Implementation, Mid Field Test, and Final Reports to Ministry	√	<b>NA</b>
Establish Lead/Steering Committee	√	√
Establish Partnerships	√	√ <b>X</b>
Identify Individual and Organizational Goals for Mentoring	√	√ <b>X</b>
Develop Mentoring Implementation Parameters	√	√ <b>X</b>
Recruit and Select Mentors	√	√ <b>X</b>
Prepare Mentors for Role	√	√ <b>X</b>
Provide Orientation of Mentees to Mentoring	√	√ <b>X</b>
Provides Support for Mentee Learning Needs Assessment	√	√ <b>X</b>
Match Mentors and Mentees	√	√ <b>X</b>
Provide an Exit Process	√	√ <b>X</b>
Provide Mentee Learning Plan Template & Support	√	√ <b>X</b>
Conduct Monitoring and Evaluation	√	√ <b>X</b>
Support External Evaluation Team	√	√ <b>X</b>

## 5. FUNDING AND REPORTING REQUIREMENTS

### 5.1 Overview

The ministry will provide funding to director and supervisory officer associations that make application to participate in the Mentoring for Newly Appointed Directors of Education and Supervisory Officers field test and that meet the requirements set out in this guide.

A Funding Agreement will be developed with each participating association that specifies its funding allocation and deliverables. Should an association fail to meet the requirements or deadlines outlined in its Funding Agreement, the ministry may, at its discretion, cancel further transfer payments under the agreement and/or require the association to return any unspent funds already transferred.

### 5.2 Eligible Expenses

Eligible expenditures include:

- Implementation planning and goal-setting for Mentoring (e.g. participation in training, purchase of books or other resources, seeking consulting services of another association or organization)
- Preparation of mentors (e.g. mentor preparation, mentee orientation and group professional learning, attending external professional learning, or bringing an external expert into the board to provide training)
- Orientation of mentees (e.g. provided by the board and/or participating with mentors in external professional training)
- Purchase and/or development of resources (must agree to share and build on other available resources)
- Supply coverage to participate in mentoring, attend training, and/or board workshops
- Meeting costs including travel and accommodations (The ministry expects associations will have guidelines in place to ensure economical travel and accommodation.)
- Program coordination and planning

Expenditures that require pre-approval by the ministry include other expenses related to Mentoring not listed above. Ineligible expenditures include:

- Capital expenditures (e.g. furniture and equipment)
- Staff/support staff not related to Mentoring (e.g. Educational Assistants or School Office Administrative support)
- Resources for students (e.g. textbooks) and classroom materials

Note that funds allocated prior to March 31<sup>st</sup>, 2009 must be spent by March 31<sup>st</sup>, 2009. Unused funds must be returned to the ministry as outlined in the Funding Agreement.

## 5.3 Application and Reporting Requirements

The information gathered through the application and reporting process will be included in the overall evaluation of the field test by the contracted external evaluator.

### 5.3.1 Application Process

Director of education and supervisory officer associations in collaboration with school boards are eligible to the ministry for funding to sponsor Mentoring for newly appointed directors of education and supervisory officers as part of the 2008-2009 field test. The application form provided in Appendix C requests specific information about how the requirements of the field test as outlined in the *Mentoring for Newly Appointed Directors of Education and Supervisory Officer Field Test Guide* will be addressed.

Please note that collaboration is expected among associations and school boards to provide Mentoring for directors of education and supervisory officers. The application associations submit to the ministry must identify which of the following two ways boards are working with the associations in the field test:

1. participating in the association-sponsored Mentoring and benefiting from the association's management of the Mentoring provided, or
2. designing and managing their own Mentoring, ensuring that the board-designed Mentoring meets the field test requirements, specified in this *Guide* including:
  - submission of a field test application through the appropriate association
  - fulfilling the ministry reporting requirements through the appropriate association, and
  - participating in any field test activities such as meeting with the external field test evaluator and the ministry.

### 5.3.2 Reporting Requirements

The following are the reporting requirements of the Mentoring for Newly Appointed Directors of Education and Supervisory Officers Field Test that participating associations must meet:

- **Implementation Plan:**  
Associations are required to submit a detailed implementation plan that includes activities and expected results following approval of their application and in advance of their mid field test report.
- **Mid Field Test Report**  
Associations are required to submit, on a date specified in their contracts with the ministry a mid field test progress and financial report. The second instalment in accordance with the funding agreement will be issued after approval of the mid field test report.
- **Final Report**  
Associations are required to submit, on a date to be specified in their individual contracts with the ministry a final report on the Project including a Detailed Accounting Statement itemizing all costs at the conclusion of the Project, signed by the Chief Financial Officer or other authorized official of the association. The third and final installment in accordance with the funding agreement will be issued after approval of the final report.

# Appendix A:

## THE 2007- 2008 MENTORING AND COACHING PILOT – SYSTEM LEADER COMPONENT

### Association Leadership in the Pilot

For OPSOA and CODE, the provincial pilot was an opportunity to expand and deepen its existing mentoring program for supervisory officers as well as extend it to all newly appointed directors of education.

For OCSOA, with no pre-existing program, the pilot presented an opportunity to design and develop an appropriate program to support newly appointed supervisory officers in the Catholic system. The decision to work collaboratively with the Catholic principals' association was viewed as an "unprecedented level of cooperation and collaboration between the two organizations and among the many boards involved".

For ECCODE, the challenge was to design and develop an appropriate program to support newly appointed directors in the Catholic system without a base to draw on.

For AGÉFO and CODÉLF, their willingness to offer Mentoring for system leaders was offset by limited capacity to meet the timelines and parameters of the pilot such that they were unable to participate in the pilot.

In the provincial pilot, the system leader component included both directors of education and supervisory officers.

#### • Director of Education Strand

In the director of education strand which was launched well into the pilot year, the two English director of education associations, the Council of Ontario Director of Education (CODE) and the English Catholic Council of Ontario Directors of Education (ECCODE) each took responsibility for developing and coordinating a pilot model for newly appointed directors of education. Each association collaborated with their respective English supervisory officer associations – the Ontario Public Supervisory Officials' Association (OPSOA) and the Ontario Catholic Supervisory Officers' Association (OCSOA).

#### • Supervisory Officer Strand

The English public and Catholic supervisory officer associations – OPSOA and OCSOA – each took responsibility for developing and coordinating a model of mentoring for newly appointed supervisory officers, the Catholic association doing so in collaboration with the Catholic Principals' Council of Ontario (CPCO).

- **Common Features of Mentoring for System Leaders**

Features that were common to the mentoring provided for both directors of education and supervisory officers included:

- One-to-one pairing of a mentee and a mentor
- Continuous intake during the year to accommodate newly appointed supervisory officers and directors
- Preparation for mentors mainly but not exclusively focused on the mentoring relationship and coaching skills
- Expected participation in a number of face-to-face meetings during the year between each mentor and mentee supplemented with telephone and email exchanges
- A series of meetings and teleconferences, attended by mentors, focused on topics particularly relevant to new directors of education and supervisory officers.

# Appendix B

## SAMPLE LEARNING PLAN/MENTORING AGREEMENT

<b>Mentee:</b>		<b>Date Developed:</b>
<b>Mentor:</b>		<b>Dates Reviewed:</b>
<b>Mentoring Plan; e.g., frequency of meetings, possible meeting formats and locations</b>		
<b>Proposed Contact Schedule (record revisions as needed)</b>		
<b>Learning Priorities (Reference the Ontario Leadership Framework, the Leadership Self-Review Tool (LSRT), board priorities, individual needs and interests)</b>		
<b>Date of Entry</b>	<b>Goal</b>	<b>Resources, Strategies &amp; Notations Related to Results/Outcomes &amp; Next Steps</b>

# Appendix C

## MENTORING FOR NEWLY APPOINTED DIRECTORS OF EDUCATION AND SUPERVISORY OFFICERS FIELD TEST

### APPLICATION FORM

Director of education and supervisory officer associations in collaboration with school boards are eligible to apply for ministry funding to sponsor Mentoring for newly appointed directors of education and supervisory officers as part of the ministry's 2008-2009 field test. The application form provided below requests specific information about how the requirements of the field test as outlined in the *Mentoring for Newly Appointed Directors of Education and Supervisory Officer Field Test Guide* will be addressed.

Please note that collaboration is expected among associations and school boards to provide Mentoring for directors of education and supervisory officers. The applications associations submit to the ministry must identify which of the following two ways boards are working with the associations in the field test:

1. participating in the association-sponsored Mentoring and benefiting from the association's management of the Mentoring provided, or
2. designing and managing their own Mentoring, ensuring that the board-designed Mentoring meets the field test requirements specified in the *Guide* including
  - submission of a field test application through the appropriate association,
  - fulfilling ministry reporting requirements through the appropriate association, and
  - participating in any field test activities such as meeting with the external field test evaluator and the ministry.

Associations must submit the completed application form by e-mail to [julie.reid@ontario.ca](mailto:julie.reid@ontario.ca) on or before a date to be announced by the ministry. Original copies of the signature pages of this application form must also be faxed to Julie Reid, Leadership Development Branch, Ministry of Education at (416) 325-7019 on/or before a date to be announced by the ministry. In case of transmission difficulties please contact Frances Myre at (416) 325-1073.

#### SECTION A: CONTACT INFORMATION OF DESIGNATED LEAD(S) FOR THE ASSOCIATION

ROLE(S) IN FIELD TEST	NAME(S) & POSITION(S) IN ASSOCIATION/SCHOOL BOARD	SIGNATURE	E-MAIL ADDRESS	TELEPHONE & FAX NUMBERS
Association/ School Board Lead(s)				

#### SECTION B: ESTABLISHING A LEAD/ STEERING COMMITTEE

Describe the organizational structure including names of partner associations that will be put in place to oversee the Mentoring provided. Include specific roles and responsibilities of all those involved.

# Appendix C (continued)

## APPLICATION FORM

### SECTION C: IDENTIFYING GOALS FOR MENTORING

What goals for Mentoring have been established to support individual and organizational development?

### SECTION D: PROVIDING QUALITY MENTORING

1. Approximately how many mentees and mentors will be involved?

	Mentees in their 1 <sup>st</sup> year	Mentees in their 2 <sup>nd</sup> year	Mentors
Directors of Education			
Supervisory Officers			

2. How will the mentors be identified? Check all that apply:

- Identify practicing directors of education and supervisory officers
- Identify retired directors of education and supervisory officers
- Identify mentors who hold executive positions in other organizations
- Other, specify: \_\_\_\_\_

3. What approaches to Mentoring will be made available?

- One-to-One Mentoring Only
- Facilitated Small Group Mentoring Only
- A Combination of One-to-One and Small Group
- Electronic; e.g., web conference, email
- Other, specify: \_\_\_\_\_

(a) Will the mentors be compensated?  Yes  No

(b) If yes, provide the rationale and rate of compensation: \_\_\_\_\_

4. What process will be followed for selection of mentors?

- Established criteria; e.g. mentor preparation for the role, expertise, accessibility
- Interview process
- Results of initial mentee needs assessment
- Other, specify: \_\_\_\_\_

## Appendix C (continued)

### APPLICATION FORM

**5. How will mentors be prepared for their role as mentor over time?**

- Orientation program
- Network of mentors
- Scheduled coaching conversations
- Support materials such as mentor handbook
- Individual support from mentoring 'lead'
- Other, specify: \_\_\_\_\_

**6. How will mentees be prepared for the Mentoring that will be provided?**

- Orientation program
- Learning plan/mentoring agreement
- Individual support from mentor
- Network of mentees
- Face-to-face group meeting of mentors and mentees
- Support materials such as mentee handbook
- Other, specify: \_\_\_\_\_

**7. How will mentee learning needs be assessed over time?**

- Initial written survey
- Informal Interview
- Dialogue with mentor
- Reflective journal
- Learning plan development and review
- Other, specify: \_\_\_\_\_

**8. What approach will be used to match mentors with mentees?**

- Face-to-face group meeting of mentors and mentees
- Orientation program
- Mentee input
- Advice from board director
- Other, specify: \_\_\_\_\_

**9. What provisions for an exit process are planned?**

- Protocols provided at beginning of Mentoring process
- 'Monitoring' by Mentoring 'lead'
- Other, please specify: \_\_\_\_\_

# Appendix C (continued)

## APPLICATION FORM

### SECTION E: SUPPORTING DEVELOPMENT OF THE MENTEE LEARNING PLAN

Outline how the mentee learning plan\Mentoring agreement will be developed. Explain how the Leadership Framework for Supervisory Officers will be used as a resource.

### SECTION F: MONITORING AND EVALUATION OF THE MENTORING

Outline strategies that will be used to monitor and evaluate the Mentoring over time.

### SECTION G: SUPPORTING FIELD TEST EVALUATION PROCESS

What communications will be established to ensure support for the field test evaluation process?

### SECTION H: PROPOSED FUNDING ALLOCATION

Please refer to guidelines set out in Section 5.2 Eligible Expenses in *the Mentoring for Newly Appointed Directors of Education and Supervisory Officers Field Test Guide*

Key cost categories	Description of each key activity with cost per activity	Timelines (Specify the beginning & end dates)	PROJECTED COST
PROGRAM DEVELOPMENT			
PROGRAM ORGANIZATION			
PROGRAM IMPLEMENTATION			
TOTAL FUNDING ALLOCATION REQUESTED			

## Appendix D

### DIRECTOR OF EDUCATION AND SUPERVISORY OFFICER ASSOCIATION CONTACTS

Association des gestionnaires en éducation franco-ontarienne (AGÉFO)	Tel.: 613-747-8000, ext. 253 Website: <a href="http://www.agefo.ca">http://www.agefo.ca</a>
Council of Ontario Directors of Education (CODE)	Tel.: 905-845-4254 Website: <a href="http://www.ontariodirectors.ca">http://www.ontariodirectors.ca</a>
English Catholic Council of Directors of Education (ECCODE)	Tel.: 905-564-8206 Website: <a href="http://www.ocsoa.ca">http://www.ocsoa.ca</a> .
Conseil ontarien des directions de l'éducation de langue française (CODÉLF)	Tel.: 905-564-8206 Website: <a href="http://www.cforp.on.ca">http:// www.cforp.on.ca</a>
Ontario Catholic Supervisory Officers' Association (OCSOA)	Tel.: 905-564-8206 Website: <a href="http://www.ocsoa.ca">http://www.ocsoa.ca</a>
Ontario Public Supervisory Officials' Association (OPSOA)	Tel.: 905-845-7003 Website: <a href="http://www.opsoa.org">http://www.opsoa.org</a>

# Appendix E

## OTHER KEY PARTNERS AND STAKEHOLDERS

<b>Principal Association Contacts</b>	
Association des directions et directions adjointes des écoles franco-ontariennes (ADFO)	Tel.: 613-789-1998 Website: <a href="http://www.adfo.org">http://www.adfo.org</a>
Catholic Principals' Council of Ontario (CPCO)	Tel.: 416-483-1556 Website: <a href="http://www.cpcoco.on.ca">http://www.cpcoco.on.ca</a>
Ontario Principals' Council (OPC)	Tel.: 416-322-6600 Website: <a href="http://www.principals.on.ca">http://www.principals.on.ca</a>

<b>Providers of Professional Learning and Capacity Building Supports</b>	
Institute for Education Leadership	Website: <a href="http://www.education-leadership-ontario.ca">http://www.education-leadership-ontario.ca</a>
The Learning Partnership	Tel.: 416-440-5100 Website: <a href="http://www.thelearningpartnership.ca">www.thelearningpartnership.ca</a>