



CSML
Civil Society and Media Leadership Program
Liberia



MENTORING

For

Capacity Building of Civil Society Organizations

Facilitator's Manual

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Introduction

This training manual was developed to train mentors and master trainers who provide training and in-office mentoring to 80 civil society organizations and community radio stations through the Liberia Civil Society and Media Leadership Program (CSML). The program is implemented by IREX with funds from the U.S. Agency for International Development. CSML's goal is to build the organizations' capacity to sustain peace in Liberia through greater inclusion, giving a voice to, informing and engaging Liberian citizens. The mentors and master trainers come from CSML's Resource Partner CSOs.

The training activities outlined here are intended for a 2 1/2-day residential workshop. The half-day on Day Three was used in Liberia for CSML program-specific planning and decision-making activities.

Some materials have been adapted from other sources, which are cited.

DAY ONE

SESSION ONE: Introduction

Time: 1 hour

Handouts: 1 Objective

Objective: By the end of the session participants will

- Be more familiar with the other participants and trainers, and the training schedule norms, and learning objectives.

Facilitators introduce themselves and ask participants to introduce themselves, using any popular model or approach.

Facilitator leads brief discussion of ground rules, and overview of facilities (location of restrooms, etc.)

Facilitator elicits a list of expectations from the trainees and writes on flipchart. Then explains objectives, which are prepared on chart in advance and in handouts for participants' mentoring notebook:

Overall Workshop Objectives:

By the end of training, participants will be able to -

1. Explain what mentoring is in the CSML program
2. Provide reasons for using the mentoring approach
3. Cite and discuss at least 5 techniques or strategies for effective mentoring.
4. Discuss the characteristics of the 4 stages of the mentoring relationship and the activities to employ in each
5. Discuss goal setting in mentoring and the characteristics of good goals.
6. *(CSML-specific) State the most important things the mentor must do while overseeing the Referendum activities grants.*
7. *(CSML-specific) Cite ideas for the evaluation of networking opportunities*

Facilitator shows list of training topics requested at May 6 meeting and compares to objectives and leads discussion to get concurrence that the objectives match well with the earlier topics list. S/he then asks trainees to compare with expectations and identify any expectations that may not be realistic given the training objectives.

SESSION TWO: Mentoring in the CSML Context – What and Why?

Time: 1 hour

Handout: Handout 2 Mentoring What and Why

Objectives: By the end of training, participants will be able to -
Explain what mentoring is in the CSML program
Provide reasons for using the mentoring approach

Facilitator: What is mentoring? (Substitute with coaching for our purposes)

Give background:

What is a mentor: In Homer's story "The Odyssey," when Odysseus left for the Trojan War, he entrusted Mentor with the guidance and education of his son, Telemachus. The name of Odysseus' friend is Mentor.

The word "mentor" comes from the Greek language and has its roots in the terms "steadfast" and "enduring." In Western thought, the term "mentor" is synonymous with one who is a wise teacher, a guide, a friend.

Re-emphasize: A mentor is

A wise teacher

A guide

A friend

Facilitator reminds participants that they developed a definition of mentoring in the CSML context at their meeting on May 6 at NARDA: It is in the mentoring notebook.

CSML mentoring is the transfer of knowledge, skills, and expertise from a more experienced person/group to a less experienced/group for improvement, growth, and positive change. It includes the below:

1. Supportive process
2. Facilitating/facilitation
3. Experiential leaning/ action learning
4. Relationship

Facilitator takes discussion and questions on the above if needed.

Post-training note: In this discussion, participants discussed the above definition and revised it as follows:

CSML mentoring is the transfer of knowledge, skills, and expertise from a person/group with certain sets of experience and knowledge to another person/group desiring it for mutual improvement, growth, and positive change. It includes the below:

- Supportive process
- Facilitating/facilitation
- Experiential leaning/learning through reflection and action
- Relationship.

Facilitator - why is CSML using mentoring for capacity building of CSOs?

Read the following and tell them it will be on a handout:

What does it take to develop your people and your organization?

"It takes more than sending someone to a training class. It takes more than hard work on the part of your employees. What development takes are people – from the CEO's office to the mailroom – people who are willing to listen and to help their colleagues. Development takes coaches; it takes guides; it takes advocates. Development depends on mentors."

(From humanresources.about.com)

Facilitator stress the point: "Mentoring is therefore putting people into organizational capacity building, making capacity building a person-to-person process."

Facilitator in large group -

There is one major purpose for which CSML chose to use mentoring in its program. Who knows what it is? Guide their ideas with the following –

How have we said we're using mentoring? What's going along with our mentoring?

(Answer – To complement and support training, to bridge the gap between theory and practice. Formal training is complemented by the knowledge and the hands-on experience of another person)

Now we will discuss the benefits of mentoring to the three distinct groups.

What are some specific benefits to individuals who are mentored?

Write answers on flip chart, ensure the following are included:

- Build's the individual's skills
- Provides role model for leadership and management in a way that can't be taught in training
- Gives support to individuals and groups who are left out of senior management who started out behind and who need more self-confidence (ex.: illiterate or under-educated, women, youth, elderly, minority ethnic groups)
- To work on developing changes through communication on a one-to-one basis with regular follow up
- Provide motivation
- Encourage changes
- Cultivate the right attitudes

What are some benefits to the organization being mentored?

Write answers on flip chart, ensure the following are included:

- Change work culture
- Develop the organization's performance capacity
- Share the values, vision and mission of mentor's organization with the mentee organization
- Provide motivation
- Encourage changes
- Cultivate the right attitudes
- Provides opportunity for networking with more established CSO

What are some benefits to the organization doing mentoring?

Write answers on flip chart, ensure the following are included:

- Learning is a lifelong process, and assisting development of others is one of the most effective ways to learn.
- Provides opportunity for networking with other CSOs

Facilitator: Questions?

Facilitator closes by summarizing main points:

- ***What we mean by mentoring in the CSML context (read definition again)***
- ***There are benefits to the individual and organization being mentored, but also to the individual/organization doing the mentoring.***

SESSION THREE: Mentoring Techniques, Strategies and Skills

Time: 2 – 2 ½ hours

Handout: Handout 3 Mentoring Techniques, Strategies and Skills

Objective: By the end of the session, participants will be able to -

- Cite and discuss at least 5 techniques or strategies for effective mentoring.

Facilitator explains that there are many strategies and techniques that contribute to effective mentoring, and that we are going to discuss some of the most important ones.

Distribute handout 2 and divide them into groups depending on numbers (ideal group size for this is 4-5). Assign each group to work with one, two, or three strategies (depending on number of groups) and prepare answers to the questions with each strategy.

(Note: the answers shown below are not in the handout.)

Groups write their answers on flipchart paper to present. Facilitator may use the answers below to help groups having trouble, or may use them during the report back by adding them to the flipcharts during discussion. Allow 45 minutes for group work (adjust according to number of techniques each group is working on).

1. Use a learning agreement

A learning agreement is useful in clarifying objectives and expectations. It also establishes ground rules to address ethical considerations.

Questions:

- How soon in the mentoring relationship should a learning agreement be developed? (Answer: allow some time for identifying together what the mentoring will consist of; what will work best, what are the needs, etc.)
- What should be in the learning agreement? (Answer: agreement on set goals, means of feedback in both directions)
- Remember that we have a Mentoring MOU form that should be used at the start of each relationship. How would the learning agreement be different from the MOU? (Answer: it's more specifically tailored to the organization and individual, while the MOU is for all CSO mentees.)
- Would the learning agreement need to be updated or revised over time, or should it serve during the entire period of mentoring assistance? (It should be updated as needed to reflect current needs, goals, approaches, etc.)

2. Have purposeful conversations ***(Note: Point out that this will relate to goal setting, to be discussed tomorrow.)***

Structured, constructive and meaningful conversations are the core of the process. These are *purposeful* conversations.

- What is meant by conversations that are structured? (Answer: it is planned in advance. The mentor must do homework)
- How is a meaningful learning conversation different from a talk in which the mentor gives the mentee information. (Answer: it provides reasons for your suggestions)

instead of just giving suggestions or directions. This helps to show/demonstrate why the suggestion is made, and understanding why is helpful to learning.)

3. Create trust and a safe space

Good coaching is based on a trusting relationship.

- What is meant by a safe learning environment?
- What are the elements that contribute to a “safe” space for learning? (Answers: confidentiality, reliability (regular, on time, consistent in what you say and do), encouragement, good listening skills, showing interest in the person(s), having time for fun together).
- Why is a safe space helpful for learning? (can speak confidentially, ask questions without embarrassment or fear, explore, innovate with fear of failing)
- What are some ways to instill trust?
- How is building a relationship like building a bank account? (Answer: Each time the mentor makes a deposit by giving praise or encouragement, demonstrating something successfully that helps the mentee, recognizing challenges, etc. there is more good will to offset any mistakes (withdrawals) the mentor makes.)

4. Approach your mentee on a basis of mutual respect

- Why is respect for the mentee important in the relationship?
- What are some things about the mentee that can encourage the mentor to respect the mentee? (has had experiences the mentor hasn't had, has knowledge the mentor does not have, is a unique person different from all others)
- How does being empowering demonstrate respect for the mentee?
- How can coaches and mentors be empowering? (Answers: Build on the strengths and capabilities of the participant. The mentees should take increasing responsibility for their own self-development.

5. Use effective questioning and listening

- How can the mentor word his/her questions so they encourage the mentee to speak more? (Answer: use open questions with words such as when, who, how much, rather than yes or no questions)
- How does the mentor use active listening? (Answer: summarizing what the mentee has said, asking questions, putting the focus on the mentee)
- What can the mentee's body language and tone of voice tell you?
- What are some examples of poor listening skills (Answer: interrupting, not engaging in the conversation, being too eager to tell your own stories, talking more than 1/3 of the time)
- Communication Skills
- Mentors need to listen well to communicate effectively.
- Being a good listener and understanding a person's values begins with respect. Examples – condescending attitude toward women, youth, “country people”] Listening communication means:

- Respecting the person with whom you are communicating, whatever their age. Focus on hearing what the other person is saying and be attentive to how they act.
- Stay focused. Many times we think that we are listening, when in fact we are rehearsing what we will be saying next. We worry about our remarks and practice them to make sure we get our point across. Other times we simply get lost in our own thoughts or actions.
- Remember that words have many meanings. Almost any message can be interpreted in several ways. We cannot assume just one meaning for the words heard.
- Clear communication is not the sole responsibility of the speaker. As a listener we have to be actively involved. Communication is a two-way street. Hear the words, watch the body language and try to understand the meaning of what the speaker is saying verbally and non-verbally.
- Keep your mind open. Be aware of your emotional triggers and deaf spots-the topics, words, or ideas that upset us and close down our ability to listen.

6. Be flexible in style and approach

- What are the things to consider when adjusting the mentoring style to the CSO or the individual? (Answers: style preferences of the mentees, level of education, level of experience, gender, age (especially older learners), meeting environment, the organization's capacity level, goals and objectives of the mentoring, relationship between mentor and mentees (already friends?), self-esteem (which indicates the level of encouragement needed),

7. Give Encouragement

- What are some ways to give encouragement? (Answers may include: Remind them of previous successes when something seems difficult, tell them "you can do it," note when the student/mentee tries and succeeds.)

8. Show Affection (Caring, Fondness) and Have Fun

There is a natural tendency for people to want and need affection.

- What are some appropriate ways to show affection? (Answer: shaking hands & looking in face, pat on the back, making jokes at the right moment that are not offensive.)
- What might be some inappropriate ways to show caring, fondness or affection?
- How can having a little fun during mentoring be helpful? (release stress, make the relationship more personal)
- What are some appropriate ways to have fun?

Facilitator calls groups back to large group, and each group reports its answers. Tell them the answers will be typed and distributed.

Ask for any questions or discussion as time allows.

[Facilitator Note: if you need to stop here for the day, please go to closing session for Day One, below.]

SESSION FOUR: Mentoring Don'ts

Time: 1 hour and 15 minutes

Handout: Handout 4 Mentoring Don'ts

Objective: By the end of the session, participants will be able to -

- Cite and discuss at least 5 mistakes that should be avoided for effective mentoring.

Don'ts

*Facilitator explains that there are also negative strategies for mentoring; these are approaches that can damage the mentor/mentee relationship. There are a lot of "don'ts" that should not be used in mentoring. **Arrange in advance for a team of 2-3 to give a skit illustrating some good techniques and some bad techniques, then ask observers to identify what good techniques and what bad techniques they observed. Distribute handout 4, Mentoring Don'ts, and lead a discussion.***

- Criticize the Past – Avoid bringing up past mistakes.
- Generalize Negative Behavior – Avoid words like "you always" or "you never."
Facilitator give them bad examples and they give a more useful way to give the feedback: "Why do you always throw away sheets that can be re-used as scratch paper?"
- Share Lots of Your Personal Problems – You are there for the student/mentee. Only when there is a lesson to be learned is it appropriate to share personal problems.
- Interrupt – Let your student/mentee finish telling you a story or give you information without being interrupted.
- Constantly Teach/Lecture – Recognize moments when the mentees can teach themselves, such as "What do you think of this employee agreement?"
- Pass Judgment – Wait to be asked before you offer your opinion. Don't say this is wrong; say what are some other ways to do this? Are there better ways to do this? Can I tell you how we do this? Allow your student/mentee the freedom to explore various ways of thinking and behaving even if they are different from yours.
- Criticize the Mentee's organization or fellow staff persons – It is inappropriate to criticize your mentee's employer. Even if you disapprove, do not voice your opinion. Help your mentee problem-solve issues involving their concern.
- Use a Lot of "Shoulds" – "Shoulds" provoke resistance. Find ways to say "how about if..." and other more positive phrases. Drop the authoritative role.
- Set Unrealistic Expectations – Understand that you are one force among many in the mentee's/team's job and be patient and preserving. Be aware of very small changes.

Adapted from Teammates Mentoring Training Manual for Lincoln Public Schools, Lincoln Nebraska. Teammates of Nebraska is an affiliated fund with the Nebraska Community Foundation.

Facilitator asks for questions and summarizes the main points.

[Facilitator Note: if you need to stop here for the day to allow 30 minutes for closing session, go to closing session (below) now.]

SESSION FIVE: Introduction to the Mentoring Relationship

Time: 15 minutes

Handout: None

Objective: No learning objectives; the goal is to set the tone for thinking about the mentoring RELATIONSHIP tomorrow.

Facilitator explains origins and perspectives of mentoring (*objective is to set the tone, not lay out specific topics for learning yet.*)

- Buddhist notion that –
 - every person is simultaneously a teacher and a student – an approach that has influenced some contemporary, western mentoring models.
 - Introduction: Why your organization is there. The kinds of assistance your org is receiving from the CSML program. Let them know that your organization is also hoping to improve itself, and the mentoring process is one activity in your NGO's self-improvement.
 - Japanese mentoring (the senpai-kohai relationship in particular) also emphasizes the relational aspect of mentoring; The Japanese view of mentoring is characterized by informality and the organic growth of relationships, and is based on developing bonds between mentor and mentee.
From "Coaching and Mentoring for Leadership Development in Civil Society," INTRAC
- Proactive behaviors by mentee and developmental behaviors by the mentor—The mentee needs to take the initiative and the mentor must not be directive.
Thus, combining the point above with this one, both organizations are there to learn, but the mentee organization is the one taking the lead about which direction they will go in.
- The nature of the mentoring relationship is dynamic, in the sense that it:
 - Will be different according to the circumstances, purpose, and personalities involved
 - Evolves over time
 - May take and adjust its shape along a spectrum defined by two very different philosophies or models of mentoring
- These approaches help create trusting relationships and a safe space:
Good coaching is based on a trusting relationship. This includes creating a safe environment where the person feels able to talk freely and confidentially. The coach must ensure ethical guidelines are agreed and adhered to.

Are there any questions?

CLOSING SESSION

Time: 30 minutes

Handouts: None

Objectives: Participants are able to summarize what they've experienced and solidifying their learning by making written notes on it.

Facilitator asks participants to identify 1 or 2 sentences each that capture an important idea they learned today. Let some of them share with the group.

Facilitator tells participants to take 15 minutes to write notes about what they've learned today that they want to remember and carry with them.

DAY TWO

SESSION SIX: Stages of the Mentoring Relationship

Time: 1 and ½ hours

Handout: Handout 5 Stages of the Mentoring Relationship
Handout 5-a Mentoring Workshop Notes 2011-5-06

Objective: By the end of the session, participants will be able to –

- Discuss the characteristics of the stages of the mentoring relationship and the activities to employ in each

Facilitator distributes Handout 5 and shows that space is left for them to take their own notes on the handout. Give them time to read the handout now. When they have finished, explain that the relationship between mentor and mentee follows a pattern that usually falls into four stages. Introduce each stage by writing it on flipchart, giving a summary of the information provided below, and asking questions. Record some of the best answers on flipchart for them to copy.

A. Introductory Stage

This is the beginning of the formation of a mentoring relationship. It includes assessing if the mentee organization is really ready for coaching, assessing the capacity and needs of the organization, orienting the mentee to personal and professional coaching, and clarifying how both the coach and mentee prefer to work together. [***Facilitator points out that they may have already completed this stage with some of their mentee organizations, and they may have a lot to share from it.***]

During this phase there may be uncertainty, discomfort, or resistance.

Questions: *How can these feelings be addressed?*

Some Answers:

Keep the lines of communication open

Acknowledge feelings.

Give it time. TAKE IT SLOW! Know that it's still early in the relationship.

Facilitator explains that they will look at this stage more closely in the next session.

B. Growth Stage

During the growth stage relationships may experience the following:

- The comfort level with one another has improved. The participants find it easier to share their likes and dislikes and discuss openly. Decision-making is mutual.
- Building Trust – Openness, honesty, and consistency play a big part in building a trusting relationship. Talking begins to reflect trust when you start self-disclosure.
- Guilt Feelings – In the growth stage guilt feelings are normal. Everyone has times when they are unable to follow through with plans. Letting one another know when this occurs can alleviate some of these feelings.

At this point the relationship can become more solidified, with activities such as establishing a mutual learning agreement, including the roles of the coach and mentee, ground rules for working together, frequency of meetings, confidentiality, etc.

The mentors and mentees can also finalize some goal setting, as discussed elsewhere, developing current mentee-centered goals to be achieved and setting a time period for each.

Facilitator questions: What should be the characteristics of this stage?

What steps should the mentor be taking to further the growth of the relationship?

C. Maturity Stage

A series of face-to-face meetings with the coach and mentee, including ongoing questions, affirmations, accountabilities, etc., to identify relevant and realistic actions the mentee can take to achieve the goals and learn at the same time.

- Tolerance of Negative Feedback – As your relationship matures, as trust increases; both parties find it easier to accept negative feedback.
This feedback may be in the form of negative behavior or constructive criticism.
Mentee brings more of his/her own questions and sets the direction more than mentor.
- Evaluating the mentoring/coaching, both during and shortly after the project, which is made easier if the coaching was based on mutually agreed goals?

Facilitator questions: What should be the characteristics of this stage?

What are possible mistakes the mentor should try to avoid at this stage? (What can happen once there is trust?)

D. Closure Stage (*as project nears an end*)

-Withdrawal – Letting go can occur at anytime. Be aware of this possibility if you start experiencing emotional distance from each other. You may feel you have nothing in common anymore. There may be resistance in sharing thoughts or feelings. Communication lines are breaking down.

- Avoidant Behavior – You may find excuses for not spending time together. When you are together you find physical distance is more comfortable. Goals you have set on your mentoring agreements begin to be ignored.

-Denial – It might be easier to say everything is great when it is not. Instead of denying the situation, face up to the problem and deal with it. In dealing with it you may return to the early development stage, growth stage, the maturity stage, or you may need to terminate. Mentoring closures are endings to personal relationships. Make sure they are handled positively in a mature manner and with sensitivity. They can be aided by finding steps to ensure continued learning and practicing; planning for sustainability.

Facilitator refers them to Handout 5-a Mentoring Workshop Notes 5/06 and asks them to compare and point out what ideas are different and what are the same. The handout is from the work they themselves did, and the similarities with today's materials points out that they already have a good understanding of mentoring to build upon.

Facilitator: Are there any questions?

SESSION SEVEN: Community Entry: Awakening Process and Cooperation Management

Time: 1 and ½ hours

Handout: None

Objectives: By the end of training, participants will be able to –

- Discuss the philosophy of why people resist change and give suggestions for how to encourage change.
- Cite important elements in the first introductory meeting with the mentee organization.

Facilitator says that they will go back to the first stage of the relationship now to look at it in more detail. This corresponds to their request at the May meeting to look at community entry. Facilitator says that even though they have been in this stage for some time with some CSOs, they have also recently started with new ones and will begin with more new ones in October. It is an important stage because it sets the tone which may last for a long time.

Facilitator explains the following (or reads it directly, but slowly to emphasize the points):

Facilitator Notes:

Key Idea: People don't resist change, they resist being changed.

What does this mean?

We often hear that people resist change. It isn't true. People resist being changed.

Ask: What are some reasons for them to resist being changed?

Write answers on the flipchart.

Include these answers: when they 1) don't see the need, 2) don't want to do it, or 3) believe that the change is not possible for them.

Write the following as a key message:

Whenever we ask people to change without their buy-in, we create resistance.

Write skills for cutting resistance

Some of the skills required to cut resistance and move through the mentoring/coaching process with less friction are:

Ask them and write:

- Good open communication
- Building trust
- Getting commitment, not compliance

[From "The Performance Coaching Process," Dale Carnegie and Associates, Inc., www.dalecarnegie.com]

Facilitator explains the following notes:

People are only open to the changes we advise -

1. If they are ready to change,
2. if they themselves have reason to change,
3. if they are seeking change.

How can we get them to want to change?

Let them show you the reasons for change in their organization. You may be able to start by asking questions – What changes would you like to see in your organization?

Facilitator asks for other examples. If they have trouble, use some of the following:

- Does your team look forward to doing the work of your organization each day? If not, why not?
- Do the people you want to serve (beneficiaries) understand what you are trying to do for/with them?
- Are there potential donors who know about you and your good work but you're not getting anywhere with them?
- Is everyone in the organization confident that funds are being managed in a transparent and efficient way?
- Is the organization playing through its strengths? Does it know its strengths & weaknesses, ready to accept certain strengths as the focus of their work, willing to pass up funds that would lead it in the wrong direction, totally dedicated to working through that strong area/
- Is the team really a team - Do you agree on the primary purposes and approaches of the organization? Are you willing to take a back seat to let another member develop for the good of the team?

By questions such as these, and going over the organizational assessment, let them set the direction of the mentoring.

Facilitator note: [Don't let the questions above lead too much into the common belief that they only need funds and then everything will be OK. Help them look at what they can do differently to attract the funds OR what they can do without the funds. Let them identify changes they CAN MAKE that will have impact.]

Facilitator asks participants to divide into groups (maximum 5-6 per group) to review all their notes and develop a list of the elements that should be included in the first meeting with the mentee organization. Then put them in the best order on flipchart paper. After 30 minutes they come back and each group reports.

SESSION EIGHT: Goal Setting

Time: 1 and ½ hours

Handouts: Handout 6 Goal Setting in the Mentoring Relationship
Handout 7 CSO Impact Tracking Sheet

Objectives: By the end of training, participants will be able to –

- Explain the purpose of short term goals as part of a long term goal.
- Recognize good goals and ineffective goals.
- Explain the uses of the CSO Impact Tracking Sheet

Do not distribute the handouts at the start of the session, but tell them there will be handouts.

Facilitator presents the information below:

Goal setting occurs early in the relationship, after trust and confidentiality of the relationship is understood. An effective way is for the mentor and student to keep a journal describing their goals and progress towards them.

There are several things to consider before beginning the task of goal setting.

A **long-term goal** may need to be articulated before a short-term goal can be explored. The mentee may not see the need to work toward a short-term goal unless they see the relationship of the short-term goal to a long-term goal. (i.e., graduating from high school may be the motivating factor to help them work toward short-term goals such as completing homework, attending classes regularly, etc.).

A **short-term goal** which can be immediately achieved is a good starting point (i.e., a short-term goal could be to complete all math homework assignments for the next week).

Facilitator note: Trainees may ask whether the short goal is the same as an objective. In general the two terms can be interchanges. However, stress to them that this session is focused on mentoring goals, not project goals and objectives, and not training objectives. Mentoring goals are focused on change that an individual or work team commits to.

Facilitator: ask participants to provide relevant examples.

Give handout at this point

Facilitator: Summarize each point below.

Time must be spent with the *mentee*. You will need to establish a relationship of trust and confidentiality before goal setting should be attempted.

The mentee must be **involved**. You can provide guidance, but the mentee needs to articulate the goal -- not you.

The goal should be **realistic**. If it is too difficult, it will lead to frustration and defeat.

The goal should be **challenging**. If it is too difficult, it will lead to frustration and defeat.

The goal should have a **deadline**. If it is too easy, there is little incentive to achieve it and little reward in getting there.

The goal should be **specific**. Or there may be a tendency to put off completing it.

The goal should be **obtainable**. So you know when you have gotten there.

The mentee should make a **commitment** to you and carry out the goal.

The best-laid plans in the world will never be achieved unless there is a **commitment** confirmed with a handshake, a written agreement, etc.

(Adapted from *Partners for Success, Volunteer Mentor Orientation and Training Manual, Module 2: Goal Setting*, published by the Enterprise Foundation)

Facilitator distributes the handout 6 Goal Setting and asks participants to separately write examples of long-term goals for CSOs and short-term goals that would go along with those. Write at least three.

Then in groups of 2 or 3 discuss and refine and pull together a list of the best two examples in each small group. Each group put its two best examples in a common place on the wall.

Facilitator draws participants to the wall and asks them to identify the ones they think are the best. Give reasons and discuss until there is agreement. Find at least five good ones.

Then ask whether there are some that would not be effective. Give reasons and discuss until agreement is reached. Mark any that are judged to be ineffective with a small X beside it so typist will not include it.

Goals are now ready to be typed and distributed.

Participants take their seats and facilitator directs them to look at Handout 7 CSO Impact Tracking sheet distributed at the May 6 meeting. Leads them in discussion of how these are related to the goal setting process, how they are different, and how the Impact Tracking sheet can be used.

SESSION NINE: When People Don't Follow Through

Time: 2 1/2 hours (Note: Part of session may need to be carried to Day Three)

Handout: Handout 8: When People Don't Follow Through

Objectives: By the end of training, participants will be able to –

- Discuss strategies for dealing with people who don't follow through on what they've promised.

Facilitator tells the first part of the article in his/her own words:

You've just started a coaching appointment, and the first thing you discover is that the person sitting across from you didn't do half of his action steps—for the second week in a row. Do you confront, cajole, encourage, get frustrated, or just let it go by?

A challenge all coaches face (and they face it often!) is what to do when people don't get their action steps done. The key to handling a failure to follow through is maintaining the "grace vs. truth" balance. You want to continue to offer unconditional acceptance without just letting people slide completely off the hook. A guiding principle I use in these situations is, "Give grace but don't lower the standard." That means that I **don't** go negative when people fail—like showing disappointment in them, or pointing out that they blew it, or getting prickly about doing it right. However, I **do** keep expecting that they will complete the task. In other words, don't punish people when they fail, but do help them recommit, and then nail down what they intend to do. Give grace, but maintain a high expectation that if we set out to do something, we're going to get it done.

Facilitator distributes Handout 8 and divides participants into 5 groups. Assign each group one of the techniques below (1-5) and ask them to prepare a short role play on it. After they have met and planned their role play, it may be necessary to save the role plays for the next morning and go to the Closing Session for Day Two now.

1. Check for Buy-in

When an action step doesn't get done (especially if it happens more than once), one question that often should be asked is, is this the right step? The mentee must be internally motivated to consistently succeed at their action steps. So think back: was this a step the mentee came up with, or one you suggested or requested? If not, or if it is not clear that the mentee really cares about this, ask, "Is this a step you still want to take?" or "Is this still important enough to you to get done?" As a coach, you need to be ready to hear a "No" as well as a "Yes"—in other words, you have to make this a real question and not a rhetorical one. This technique offers the added benefit of having the mentee re-verbalize their commitment to the step.

2. Identify and Troubleshoot Obstacles

I didn't do a great job on my own steps this week. But then, I was out of town at an intensive retreat for 5 days. Often an obstacle or a "life happens" circumstance will crop up and short-circuit the best laid plans. When a step doesn't get done, it is always a great practice to ask, "Tell me more about that. What happened?" Sometimes you'll uncover an important obstacle, and find that dealing with that obstacle was much more transformational than the original action step itself.

3. Reset for Next Week

A great application of the "Give grace but don't lower the standard" principle is simply resetting the step for the following week. If the person still wants to do the step, and you've made sure there aren't any major obstacles blocking them, just ask for a new deadline. Give grace for their failure to complete it, but don't allow the step to just fade away: help the mentee either makes a decisive choice to do it or a clear choice to let it go.

4. Nail Things Down Tighter

Often if it is the second time around on a step, I will ask for more detail on how it will be done. "What day will you do that?" "How much time will that step take, and when can you schedule that block of time?" or "Is there anything else you need to make sure that step happens?" Partly you are ramping up the accountability, and partly you are helping the person develop a more detailed plan for how they will actually get the thing done.

5. Reconnect with Their Motivation

Bobb Biehl says, "Without an adequate answer to the questions, 'Why?'. the price is always too high." Sometimes you need to reconnect people to why they chose to take a step in the first place. "What motivated you to set out to do this?" "What will it mean to you if you accomplish this?" or "What will it cost you if you don't get this done?" are all good ways to help a person find a compelling reason to follow through on what they know they need to do.

[By Tony Stoltzfus, professional coach and coach trainer

<http://www.coach22.com/discover-coaching/resources/11-06whattodo.htm>]

FACILITATOR: Possibly stop here and continue in Day Three.

Facilitator asks for comments or questions.

Then facilitator closes this topic by discussing the points made below:

Do not become quickly discouraged: Some of the mentee's behavior patterns have taken a long time to develop. Although some improvements may appear, permanent changes in behavior come slowly. Mentors become impatient and want change overnight. You must be patient. It may take ten years before a mentee says: "Do you know who made a difference in my life? My mentor when I was in a small CSO."

TeamMates Mentoring Training Manual for Lincoln Public Schools, Lincoln Nebraska.

TeamMates of Nebraska is an affiliated fund with the Nebraska Community Foundation.

DAY TWO CLOSING SESSION

Time: 30 minutes

Objectives: Participants are able to summarize what they've experienced and solidify their learning by making written notes on it.

Facilitator asks participants to identify 1 or 2 sentences each that capture an important idea they learned today. Let some of them share with the group.

Facilitator tells participants to take 15 minutes to write notes about what they've learned today that they want to remember and carry with them.

DAY THREE

NOTE: DAY THREE CAN BE USED FOR PROGRAM-SPECIFIC PLANNING SESSIONS AS NEEDED. IT IS A HALF-DAY IF POSSIBLE TO ALLOW TRAINEES TO TRAVEL THE SAME DAY.

SESSION NINE: Completion from Day Two

FACILITATOR: Each group presents role play. Facilitator summarizes and makes points from notes at the end of Session Nine

SESSION TEN: Mentoring on the Referendum Grant

Time: 1 hour

Handouts: None

Objectives: By the end of training, participants will be able to –

- State what area of grant management will be the focus for the Referendum grants.

Lyn and Cerue lead a discussion on the challenges the RPs face in administering the Referendum grant and address them.

Emphasis is on teaching good financial practices and getting acceptable financial reports in quickly.

SESSION ELEVEN: Developing the CSO Toolbox – Discussion

Time: 1 hour

Handouts: None

Objectives: By the end of training, participants will be able to –

- Identify from the assembled policies and forms those that are most useful to Liberian CSOs and where revisions will be needed.

SESSION TWELVE: Networking and Partnership

Time: 30 minutes

Handouts: Handout 9 Network Analysis Tool

Objectives: By the end of training, participants will be able to –

- Use the Network Analysis Tool to evaluate the most suitable partners for various network collaborations.

Workshop Closing Session

1. ***Trainee volunteers facilitate closing session***
2. ***Distribute pre- and post-test***
3. ***Distribute Evaluation sheets***



CSML
*Civil Society and Media Leadership
Program*



CSML Resource Partner

Mentoring Training Workshop

December 3-5, 2011

TRAINING OBJECTIVES

By the end of training, participants will be able to –

1. Explain what mentoring is in the CSML program
2. Provide reasons for using the mentoring approach
3. Cite and discuss at least 5 techniques or strategies for effective mentoring.
4. Discuss the characteristics of the 4 stages of the mentoring relationship and the activities to employ in each
5. Discuss goal setting and the characteristics of good goals.
6. State the most important things the mentor must do while overseeing the Referendum activities grants.
7. Cite ideas for the evaluation of networking opportunities



CSML
*Civil Society and Media Leadership
Program*



Mentoring Workshop

August 3-5, 2011

CSML Definition of Mentoring (from meeting May 6, 2011:

CSML mentoring is the transfer of knowledge, skills, and expertise from a more experienced person/group to a less experienced person/group for improvement, growth, and positive change. It includes the below:

1. Supportive process
2. Facilitating/facilitation
3. Experiential leaning/ action learning
4. Relationship

Why Use Mentoring?

What does it take to develop your people and organization?

“It takes more than sending someone to a training class. It takes more than hard work on the part of your employees. What development takes is people – from the CEO’s office to the mailroom – people who are willing to listen and to help their colleagues. Development takes coaches; it takes guides; it takes advocates. Development depends on mentors.”

(From - humanresources.about.com)

Handout 3

Mentoring Techniques, Strategies and Skills

1. Use a learning agreement

A learning agreement is useful in clarifying objectives and expectations.

Questions:

- How soon in the mentoring relationship should a learning agreement be developed?
- What should be in the learning agreement?
- Remember that we have a Mentoring MOU form that should be used at the start of each relationship. How would the learning agreement be different from the MOU?
- Would the learning agreement need to be updated or revised over time, or should it serve during the entire period of mentoring assistance?

2. Have purposeful conversations:

Structured, constructive and meaningful conversations are the core of the process. These are purposeful conversations.

- What is meant by conversations that are structured?
- What is meant by a purposeful conversation?
- How is a meaningful learning conversation different from a talk in which the mentor gives the mentee information?

3. Create trust and a safe space:

Good coaching is based on a trusting relationship.

- What is meant by a safe learning environment?
- What are the elements that contribute to a “safe” space for learning? (answers: confidentiality, reliability)
- Why is a safe space helpful for learning?
- What are some ways to instill trust?
- How is building a relationship like building a bank account?

4. Approach your mentee on a basis of mutual respect:

- Why is respect for the mentee important in the relationship?
- What are some things about the mentee that can encourage the mentor to respect the mentee?
- How does being empowering demonstrate respect for the mentee?
- How can coaches and mentors be empowering?

5. Use effective questioning and listening:

- How can the mentor word his/her questions so they encourage the mentee to speak more?
- How does the mentor use active listening?
- What can the mentee’s body language and tone of voice tell you?

- What are some examples of poor listening skills?
6. Be flexible in style and approach:
 - What are the things to consider when adjusting the mentoring style to the CSO or the individual?
 7. Give Encouragement
 - What are some ways to give encouragement?
 8. Show Affection (Caring, Fondness) and Have Fun
- There is a natural tendency for people to want and need affection.
- What are some appropriate ways to show affection?
 - What might be some inappropriate ways to show caring, fondness or affection?
 - How can having a little fun during mentoring be helpful?
 - What are some appropriate ways to have fun?

Handout 4

Mentoring Don'ts

When mentoring, try to AVOID doing the following:

- Criticize the Past – Avoid bringing up mentee's past mistakes.
- Generalize Negative Behavior – Avoid words like "you always" or "you never."
- Share Lots of Your Personal Problems – You are there for the student/mentee. Only when there is a lesson to be learned is it appropriate to share personal problems.
- Interrupt – Let your student/mentee finish telling you a story or give you information without being interrupted.
- Constantly Teach/Lecture – Recognize moments when the mentees can teach themselves, such as "What do you think of this employee agreement?"
- Pass Judgment – Wait to be asked before you offer your opinion. Don't say this is wrong; say what are some other ways to do this? Are there better ways to do this? Can I tell you how we do this? Allow your student/mentee the freedom to explore various ways of thinking and behaving even if they are different from yours.
- Criticize the Mentee's organization or fellow staff persons – It is inappropriate to criticize your mentee's employer. Even if you disapprove, do not voice your opinion. Help your mentee problem-solve issues involving their concern.
- Use a Lot of "Shoulds" – "Shoulds" provoke resistance. Find ways to say "how about if..." and other more positive phrases. Drop the authoritative role.
- Set Unrealistic Expectations – Understand that you are one force among many in the mentee's/team's job and be patient and preserving. Be aware of very small changes.

From TeamMates, TeamMates of Nebraska is an affiliated fund with the Nebraska Community Foundation

Handout 5 Stages of the Mentoring Relationship

A. Introductory Stage

This is the beginning of the formation of a mentoring relationship. It includes assessing if the mentee organization is really ready for coaching, assessing the capacity and needs of the organization, orienting the mentee to personal and professional coaching, and clarifying how both the coach and mentee prefer to work together. [***Facilitator points out that they may have already completed this stage with some of their mentee organizations, and they may have a lot to share from it.***]

During this phase there may be uncertainty, discomfort, or resistance.

Questions: How can these feelings be addressed?

B. Growth Stage

During the growth stage relationships may experience the following:

- The comfort level with one another has improved. The participants find it easier to share their likes and dislikes and discuss openly. Decision-making is mutual.
- Building Trust – Openness, honesty, and consistency play a big part in building a trusting relationship. Talking begins to reflect trust when you start self-disclosure.
- Guilt Feelings – In the growth stage guilt feelings are normal. Everyone has times when they are unable to follow through with plans. Letting one another know when this occurs can alleviate some of these feelings.

Questions:

What should be the characteristics of this stage?

What steps should the mentor be taking to further the growth of the relationship?

C. Maturity Stage

-Tolerance of Negative Feedback – As your relationship matures, as trust increases, both parties find it easier to accept negative feedback.

This feedback may be in the form of negative behavior or constructive criticism.

Mentee brings more of his/her own questions and sets the direction more than mentor

Questions: What should be the characteristics of this stage?

What are possible mistakes the mentor should try to avoid at this stage? (What can happen once there is trust?)

D. Closure Stage (*as project nears an end*)

-Withdrawal – Letting go can occur at anytime. Be aware of this possibility if you start experiencing

emotional distance from each other. You may feel you have nothing in common anymore.

There may be resistance in sharing thoughts or feelings. Communication lines are breaking down.

- Avoidant Behavior – You may find excuses for not spending time together. When you are together you find physical distance is more comfortable. Goals you have set on your mentoring agreements begin to be ignored.

-Denial – It might be easier to say everything is great when it is not. Instead of denying the situation, face up to the problem and deal with it. In dealing with it you may return to the early development stage, growth stage, the maturity stage, or you may need to terminate.

Mentoring closures are endings to personal relationships. Make sure they are handled positively in a mature manner and with sensitivity. They can be aided by finding steps to ensure continued learning and practicing; planning for sustainability.

Handout 5-a

RPS MENTORING WORKSHOP HELD AT NARDA CONFERENCE ROOM ON MAY 6, 2011

Preliminary Discussion

- Meet with the person(s) at the RP who did mentoring for your CSOs under the first grant. Get copies of the organizational assessment, MOU, and mentoring checklists of every mentoring session.
- Consider how you can take one person from the RP with you to your first meeting with each CSO to ensure smooth transition and no misconceptions about the second year changes.

What is mentoring?

- Long term relationship between two or more persons for capacity building
- Transfer of knowledge and Skills from a more experienced to a less experienced person.
- Act of grooming nurturing and ensuring that an individual or group has what you have as skills or expertise.
- Transfer of knowledge, expertise, skills for improvement
- A supportive process of nurturing, to share learning, increase knowledge and skills and action for positive change and growth.

Final Definition:

The transfer of knowledge, skills, and expertise from a more experienced person/group to a less experienced/group for improvement, growth, and positive change.

It includes the below:

- Supportive process
- Facilitating/facilitation
- Experiential leaning/ action learning
- Relationship

Relations Building

- Trust
- Respect (mutual respect)
- Cooperation
- Sincerity and honesty
- Non judgmental
- Confidentiality
- Understanding
- Active listening
- Tolerance
- Sympathy
- Facts/factual
- Open process/open honest communication
- Recognize errors
- Handling errors in a non judgmental and efficient manner

Assumed perceptions of mentees – regarding mentors or mentoring organization

- Mentoring organization have more money
- Mentees want to engage mentors to

- Mentors want to use mentees to achieve goal using power
- Increasing work load of mentees
- Taking up their time
- See you as an intruder with hidden agenda
- Feel mentors are donor organizations
- Policing – want to spy on them and expose wrong deeds
- See mentors as knowledgeable
- See mentors as highly professional and advanced
- Think that mentors will bring more exposure for them
- Feel that mentors are providers of resource materials
- Will move them forward

Entry into mentees space for relationship building

- Provide detailed/ clear information
- Get feedback from mentees about whether they want to work with mentors
- Be open, honest
- Be responsive
- Offer to do something egg. Showing assessment results
- Be considerate and sensitive to their concerns/ issues
- Be frank – don't raise expectations
- Be confidential and earn their trust
- Do not use other organizations' experience gaps to work with another
- Develop honest and sincere reputation
- Set guiding principles/ground rules/code of conduct including dress code, timeliness to meet appointments
- Develop friendly questions
- Give assurance that mentors want to improve collaboration. Be flexible
- Jointly develop performance goals and expected results.

Summary points

- Respect (mutual)
- Earned trust/confidentiality
- Clear communication and detailed. Don't raise expectations
- Timeliness & Responsiveness/accountability
- Keeping appointments
- Define clear roles responsibilities/performance

Note: every mentee situation is unique.

Training needs

- Community entry
- Cultural awareness
- Mentoring techniques strategies and skills
- Mentee and mentor relationship
- Community awakening process and cooperation management
- Leadership for result
- Networking

- Partnership
- Exit strategy
- Coaching
- Mentoring for mentors

Handout 6

Goal Setting in the Mentoring Relationship

Goal setting occurs early in the mentoring relationship, after trust and confidentiality of the relationship is understood. An effective way is for the mentor and student to keep a journal describing their goals and progress towards them.

There are several things to consider before beginning the task of goal setting.

A **long-term goal** may need to be articulated before a short-term goal can be explored. The mentee may not see the need to work toward a short-term goal unless they see the relationship of the short-term goal to a long-term goal. (i.e., graduating from high school may be the motivating factor to help them work toward short-term goals such as completing homework, attending classes regularly, etc.).

A **short-term goal** which can be immediately achieved is a good starting point (i.e., a short-term goal could be to complete all math homework assignments for the next week).

- **Time** must be spent with the *mentee*. You will need to establish a relationship of trust and confidentiality before goal setting should be attempted.
- The mentee must be **involved**. You can provide guidance, but the mentee needs to articulate the goal -- not you.
- The goal should be **realistic**. If it is too difficult, it will lead to frustration and defeat.
- The goal should be **challenging**. If it is too difficult, it will lead to frustration and defeat.
- The goal should have a **deadline**. If it is too easy, there is little incentive to achieve it and little reward in getting there.
- The goal should be **specific**. Or there may be a tendency to put off completing it.
- The goal should be **obtainable**. So you know when you have gotten there.
- The mentee should make a **commitment** to you and carry out the goal.
- The best-laid plans in the world will never be achieved unless there is a **commitment** confirmed with a handshake, a written agreement, etc.

Adapted from *Partners for Success, Volunteer Mentor Orientation and Training Manual, Module 2: Goal Setting*, published by the Enterprise Foundation

Handout 7

CSO Tracking Sheet

Directions - How can the tool below be useful to mentoring organizations? For example, you could make a document for each CSO using only the first 3 months and use it for any time period you choose - 3 months, one year, etc.

Check the lines the CSO chooses to work on in the "XX" column. Then check the month that the goal is accomplished.
written & approved Constitution
written mission statement
written Vision
written Core Values
mission, vision and core values are displayed & staff familiar with them
Board members are elected or appointed according to constitution
Board meets regularly
Minutes of Bd meeting prepared & sent to all members in timely fashion
Roles & responsibilities of Bd members are known to Bd and staff
Separation of duties of Board & duties of senior managers are clear
Any staff member can provide a summary of the work & purpose of the CSO
Systems for internal communication are clear and used regularly (meetings, bulletin board, email, etc)
Senior management promotes ongoing dialogue on how to improve programs and functions
Program priorities match mission statement and strategic plan documents
Senior management
Senior management makes key decisions but in consultation w/ relevant stakeholders (finance & program staff, Board, beneficiaries)

Decision making considers organization's mission and strategic plan.
Organization is not hampered from addressing its mission/vision by limited funding sources.
Senior management is involved with daily management of operations.
Staff are comfortable sharing their views on the organization's activities and the way it operates
The organization is adequately staffed.
The right staff are in place for current priorities
Roles and responsibilities of different staff levels are clearly defined and understood.
Those who are designated to fill those roles have the background, training, and capabilities required.
The leadership encourages staff members to work as a team.
Staff believes they are working well as a team.
Written personnel policy is in place and available to all employees.
Personnel policy addresses recruitment/hiring procedures: severance, remuneration, working hours, benefits, leave, grievances, and conflict resolution.
Code of Conduct exists in personnel policy and employees sign acknowledgement.
Liberian labor, social security and tax laws are adhered to.
Job descriptions available for all employees.
Selection or hiring done by committee with consistent format.
Regular, ongoing supervisory support, guidance and suggestions are provided to all staff.
Staff motivation, retention is high and turnover is low
Systems have been established for staff training.
A training plan exists and is linked to the organization's mission and staff development needs
Job descriptions exist for all key positions and volunteers.
Each staff/volunteer has a copy of his/her job description.
Job descriptions are up-to-date

Financial and purchasing system is managed by financial staff separately from program staff, but in close consultation and coordination with program and management staff.

Procurement system is in place and adhered to and conforms to prevailing laws.

Regular financial reports enables organization to accurately forecast, budget, track and document advances, implement activities and provide reports to Board & funders.

Expenditures are tracked by budget line items, recorded as they occur, and variances are properly followed up and explained.

All funds received are properly recorded and deposited in bank.

Grant and contract funds (receipts and expenditures) are segregated from other funds

Bank balances are properly reconciled with bank statements.

All checks are signed by two or more senior officials (one sr manager and 1 Bd member if possible).

All expenditure is supported by properly authorized documentation /vouchers and properly coded.

Different people authorize expenditures and pay invoices

Financial information is publicly available.

Regular audit of financial systems are done and audit reports are available.

Financial documents are filed properly and not accessible to unauthorized personnel.

Total assets available exceed or equal to total liabilities

Account-related unused checks and petty cash on hand are adequately safeguarded

Strategic Plan exists, is in line with organizational mission statement and clearly indicates specific areas of focus.

Strategic Plan is revised annually in broad consultations with staff, volunteers and key stakeholders.

Stakeholder/community involvement in strategic planning exists.

Organizational SWOT analysis is carried out including areas of staff capabilities, quality of programs, management information and financial system, critical issues etc.
An annual project work plan exists as the result of an organized participatory process.
The plan establishes goals, activities, budgets for the upcoming year and timeline and M & E indicators.
The annual work plan reflects priorities in a long-term, strategic plan.
The activities of the work plan are budgeted and reflected in the annual budget.
The work plan is used as a monitoring tool by program managers who have been assigned responsibility for implementing it.
Information/data used is analyzed regularly and incorporated into planning.
The organization is able to produce clear and simple reports.
The organization produces reports in a timely fashion
All staff understand gender as the socially defined roles of male and female that can vary from one culture to another
Organization respects, encourages and promotes equal participation of men and women in management and program planning and implementation.
Gender issues are considered in all planning documents.
Staff understands the relationship between gender and HIV/AIDS, Family Planning/Reproductive Health and Gender Based Violence.
External communication channels are well defined.
Organization has and regularly maintains a Website
Stakeholder meetings are held regularly to report on progress and solicit feedback.
Regular public meetings are held within the communities of implementation or with member organizations.
Local citizens/member organizations know the organization/project
Affected citizens/organizations know where and how to provide input to the project.
Public updates are communicated regularly through radio or other media.

Planning exercises are based on needs assessment involving stakeholders.
The organization is transparent and accountable to its constituency
The organization has a media strategy that results in positive publicity about what they are doing and issues emerging from their work.
The organization associates and builds coalitions with other CSOs by sharing ideas, best practices and resources and by planning and working together to achieve similar goals.
Organization is in contact with and is well known by the public and policy makers.
The organization regularly interacts with decision makers to share best practices, lessons learned and to influence policy and development plans.
The organization is able to tap into local and national resources by successfully advocating for what it believes in and needs to accomplish its goals at the government and private sector levels.
Monitoring and evaluation are tied to strategic planning and included in the work plan.
Monitoring and evaluation are planned at or before the start of project implementation.
Provision is made to obtain input from the community, as well as the clients and stakeholders.
Information obtained through M&E is analyzed and given back to clients and other stakeholders to assure them that they have an active role in shaping service delivery.
Monitoring and evaluation data provides the basis for making adjustments in plans.
Systems for regularly collecting, storing, analyzing and reporting routine data exist and are effective.
Senior staff members are trained in the use of information to guide decisions and operational processes.
Adequate resources (money, time, effort) are used to make improvements in high priority areas.
Less reliance on key individuals to perform key functions.

Increase in written grant proposals that receive funding
Examples of Increasing diversification of funding sources, with evidence of increasing efforts to rely on local sources and local donations.
A long term financial strategy or business plan is being implemented.
Proposal and resource development are done routinely.
Marketing and promotional materials regularly distributed to targeted potential funders locally and externally.
Organization regularly monitors donor websites to identify donor opportunities matching the work of the organization
Organization maintains relationships with existing & past donors, respond to their requests quickly and keeps them informed about organization

Handout 8

When People Don't Follow Through

You've just started a coaching appointment, and the first thing you discover is that the person sitting across from you didn't do half of his action steps—for the second week in a row. Do you confront, cajole, encourage, get frustrated, or just let it go by?

A challenge all coaches face (and they face it often!) is what to do when people don't get their action steps done. The key to handling a failure to follow through is maintaining the grace vs. truth balance. You want to continue to offer unconditional acceptance without just letting people slide completely off the hook. A guiding principle I use in these situations is, "Give grace but don't lower the standard." That means that I **don't** go negative when people fail—like showing disappointment in them, or pointing out that they blew it, or getting prickly about doing it right. However, I **do** keep expecting that they will complete the task. In other words, don't punish people when they fail, but do help them recommit, and then nail down what they intend to do. Give grace, but maintain a high expectation that if we set out to do something, we're going to get it done.

Here are five practical techniques to help you do just that:

1. Check for Buy-in

When an action step doesn't get done (especially if it happens more than once), one question that often should be asked is, is this the right step? The mentee must be internally motivated to consistently succeed at their action steps. So think back: was this a step the mentee came up with, or one you suggested or requested? If not, or if it is not clear that the mentee really cares about this, ask, "Is this a step you still want to take?" or "Is this still important enough to you to get done?" As a coach, you need to be ready to hear a "No" as well as a "Yes"—in other words, you have to make this a real question and not a rhetorical one. This technique offers the added benefit of having the mentee re-verbalize their commitment to the step.

2. Identify and Troubleshoot Obstacles

I didn't do a great job on my own steps this week. But then, I was out of town at an intensive *Engaging the Heart* retreat for 5 days. Often an obstacle or a "life happens" circumstance will crop up and short-circuit the best laid plans. When a step doesn't get done, it is always a great practice to ask, "Tell me more about that. What happened?" Sometimes you'll uncover an important obstacle, and find that dealing with that obstacle was much more transformational than the original action step itself.

3. Reset for Next Week/Month

A great application of the "Give grace but don't lower the standard" principle is simply resetting the step for the following week. If the person still wants to do the step, and you've made sure there aren't any major obstacles blocking them, just ask for a new deadline. Give grace for their

failure to complete it, but don't allow the step to just face away: help the mentee either makes a decisive choice to do it or a clear choice to let it go.

4. Nail Things Down Tighter

Often if it is the second time around on a step, I will ask for more detail on how it will be done. "What day will you do that?" "How much time will that step take, and when can you schedule that block of time?" or "Is there anything else you need to make sure that step happens?" Partly you are ramping up the accountability, and partly you are helping the person develop a more detailed plan for how they will actually get the thing done.

5. Reconnect with Their Motivation

Bobb Biehl says, "Without an adequate answer to the questions, 'Why?'. the price is always too high." Sometimes you need to reconnect people to why they chose to take a step in the first place. "What motivated you to set out to do this?" "What will it mean to you if you accomplish this?" or "What will it cost you if you don't get this done?" are all good ways to help a person find a compelling reason to follow through on what they know they need to do.

By Tony Stoltzfus, professional coach and coach trainer

<http://www.coach22.com/discover-coaching/resources/11-06whattodo.htm>

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