Introduction

Two questions come to mind when school leaders think about mentors and mentoring: What is mentoring? What is the value of mentoring to me?

What is mentoring? Roberto leads a high school that is just joining the Innovative Schools program, and he wants to learn more about how he can lead innovation at his school. He wants to know who can help him learn more about innovative leadership, and what kind of assistance they can provide. He raises these questions during an Innovative Schools meeting, discovers that several peers are interested in the same issue, and learns that one of them, Zhang Ling, is interested in mentoring Roberto as they explore the issue. After additional discussion Roberto decides he wants to collaborate with Zhang Ling.

Once they are back at their schools, the two discuss the topic further and Roberto decides he wants to focus on the school leader’s role as instructional leader. Zhang Ling suggests they read an article on this topic and set a date for a video conference to discuss the reading. After reviewing the article, Zhan Ling asks Roberto if there are others at his school who might play a role in instructional leadership. Roberto had thought the role was his and his alone, but he is so influenced by this new perspective that he suggests they share the article with some of the other leaders in this school, many of them teachers, and invite them to join in the discussion. The discussion of the article is successful, and Roberto asks his mentor to brainstorm next steps. Together they decide that one powerful step Roberto can take is to share instructional leadership with some of the classroom teachers who took part in the discussion. Roberto decides to discuss this at the next staff meeting and asks Zhang Ling to observe, by video conference, and to meet with Roberto after the meeting to debrief what she observes.

Whether a mentor is working with one colleague, or with several school leaders, mentoring is first and foremost a collaborative relationship between trusted peers who face common issues. In this collaborative relationship mentors are not necessarily experts. This mentoring handbook rests on the fundamental premise that the mentor may in some situations be an expert, but will often be learning from and with their peers. In the Innovative Schools model of mentoring, both mentors and mentees are helping each other improve their craft of leadership.

Mentors may not have “the” answer, but they have the skills to help the mentee develop an answer. Zhang Ling has the skills and resources to help Roberto think more deeply about the issue he faces. She does so by providing resources and raising questions that cause him to think about his challenge from a
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Mentoring Handbook for School Leaders - Introduction

different perspective. Zhang Ling also observes as Roberto puts his ideas into practice, and she offers feedback on what she observes. Mentoring offers Roberto the personal and professional support he needs to take risks, to try something new, to be innovative.

What is the value of mentoring? For decades businesses have understood the value of mentoring and have provided mentors or coaches for their top executives. In some highly successful businesses, like Toyota, mentoring and learning in the workplace are part of the corporate culture. Mentors are offered to every employee.

Educators have for too long worked in isolation, but they are beginning to act on their recognition of the value of collaboration, mentoring and coaching. Thousands of schools in 47 countries participating in Partners in Learning provide Peer Coaching for their teachers. Researchers are also pointing to the value of collaboration and mentoring. Michael Fullan’s work on systemic innovation in schools emphasizes there are system-wide benefits to fostering collaboration in education. To realize those benefits, Fullan insists we need to do more than create “…a series of atomistic schools, however collaborative they might be internally.” (Fullan 2006, p 11) Real system-wide reform requires changing the culture of school systems from one that features competition between schools to one that emphasizes collaboration among schools (Fullan, 2006). More recently Fullan has argued that successful school systems learn together as they face common challenges and problems. Systems learning, he insists, is one of The Six Secrets of Change (Fullan, 2008). In one region of Ontario, Canada, for example, schools leaders come together for a “learning fair” where they share their successes so that all can benefit from the learning of each school. Similarly, the Innovative Schools form a system of schools that can learn from one another by collaborating to make each of the Innovative Schools more successful.

What is the key to successful collaboration among schools? Successful collaboration will not happen because we think it is valuable. Fullan emphasizes the importance of connecting peers who are working with a common purpose. He would argue mentoring is one methodology that is proven to help peers connect with a common purpose. Educators and educational research support this assertion.

When thousands of teachers and school leaders around the world have been asked, “What are the characteristics of the most effective professional learning I ever participated in?” their answers are remarkably similar. The highly effective professional learning they discuss most often includes the following characteristics:

- Focused on issues immediately relevant to me
- Sustained, intensive and ongoing
- Occurs when I need help, during the workday
- Offers structured opportunities for collaboration, feedback, and reflection

Research into effective professional learning by Darling-Hammond, Showers, Joyce, Fullan, Barber, and others reaches virtually identical conclusions. Effective professional learning is ongoing, intensive, and above all, collaborative and reflective. Each of these researchers agrees that mentoring matches this model of effective professional learning. It provides structure for
collaboration, and the Mentoring Cycle diagram to the right reflects how mentoring produces continuous improvement.

In a study of the world’s most effective school systems, Michael Barber and Mona Mourshed insist that despite cultural, historical or geographical differences, the best school systems have adopted a few norms. Schools in these highly successful systems create a culture of collaborative planning, there is focused reflection on instruction, and they utilize peer coaching to help teachers improve instruction. Barber and Mourshed also recognize the pivotal role school leaders play in promoting the culture of collaboration, which will improve students’ achievement. One effective intervention to improve academic achievement, they argue, is to develop stronger school leaders by selecting “…the best teachers to become principals, and then train them to become instructional leaders who then spend a good portion of their time coaching and mentoring their teachers.” (Barber 2007, p 28) The same coaching or mentoring skills used in instructional coaching can also play a critical role as school leaders work with leaders from other schools to tackle common issues they face.

Developing and using the communications and collaboration skills featured in this Mentoring Handbook will give school leaders in Microsoft’s Innovative Schools program the skills they need to be successful in mentoring leaders at other Innovative Schools to help them address problems and challenges. Without these critical communications and collaboration skills, research shows collaborative efforts may or may not be successful. Collaboration using these skills can produce the kind of system-wide learning that Fullan insists is essential for all schools to succeed.

**Handbook Resources**

The Innovative Schools Mentoring Handbook for school leaders is different from other mentoring programs in several ways. Perhaps the most important of these is that the Handbook assumes that there are no formally designated mentors in the program. All school leaders are expected to be a mentor and a mentee at various times. Playing these dual roles will help each of the leaders in Innovative Schools grow personally and professionally.

If we expect each school leader to be a mentor, it should be obvious that each leader must develop the mentoring skills this handbook hopes to foster and promote. Whether you will be mentoring with only one peer, or mentoring small groups, effective mentoring requires a variety of skills, some of which may be new to educational leaders. This handbook is designed to help school leaders begin to develop some of the skills they will need to become a successful mentor.

While mentoring might be most comfortable in a face-to-face environment, at times you may need to work online and at a distance. One of the resources is designed to help you be more successful if you are mentoring online. Whether your mentoring is done online or face to face, whether you are mentoring one individual or a small group, the resources in this handbook, such as setting group norms and exploring communication skills, are critical to your success as a mentor. These skills, and the experience you gain as you mentor others, will promote a collegial relationship that supports probing questions and leads to the kind of critical thinking that will promote innovation.
This handbook can be used for self study by individual school leaders. Since the most effective professional learning for educators is highly collaborative, these resources will be more powerful if used by groups or professional learning communities made up of school leaders. Several of the activities, such as the communications skills and online facilitation resources, will be much more valuable if completed by a group.

The four resources in this handbook focus on the most critical skills and strategies for successful mentoring. They are designed to start you down the road to becoming a successful mentor.

1. **Mentor Roles and Responsibilities.** Defining the potential roles and responsibilities for the mentor and mentees is critical to successful mentoring. This activity will help define those roles for one-to-one mentoring and also mentoring a group.

2. **Setting Group Norms.** Group norms are critical to effective mentoring when the mentor is working with a group, and they are equally important in one-to-one mentoring. This resource includes a proven process to set norms.

3. **Explore Communication Skills.** Research demonstrates that one of the keys to successful collaboration among educators is effective communication. This exercise introduces mentors to some of the basics of communication skills and offers an opportunity to practice communication skills using a protocol.

4. **Facilitating Online Discussion.** More and more collaboration among educators is happening at a distance. Few educators have experience in successfully leading these kinds of collaboration when they occur online. This activity is designed to start preparing school leaders to participate in and facilitate online discussions effectively.

Each of these resources is organized into five parts:

- **Description** – Read a definition of the key strategy or skill.
- **Snapshot** – View how one mentor applies the key strategy or skill.
- **Apply** – Complete an activity to help you learn more about the key strategy or skill.
- **Reflect** – Extend your learning by reflecting on ways the strategy or skill could impact your work.
- **Additional Resources** – Use these to learn more about the strategy or skill.
References


Mentor Roles and Responsibilities

What roles will I play and responsibilities will I have as a mentor?

What are the roles of a mentee?

Description

Whether engaged in one-to-one or one-to-many mentoring, each Innovative Schools leader is likely to take on differing roles and responsibilities as a mentor or mentee. As you compare possible roles and responsibilities to your own skills and knowledge you will develop a vision for mentoring and define a starting point for your unique role.

In this activity, you will explore possible mentor and mentee roles and responsibilities and consider the importance of trust in the mentoring relationship.

<table>
<thead>
<tr>
<th>Mentor Roles and Responsibilities</th>
<th>Mentee Roles and Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Provide Expertise</td>
<td>• Set clear professional goals</td>
</tr>
<tr>
<td>• Collaborate on a plan or project</td>
<td>• Define how to measure progress towards goals</td>
</tr>
<tr>
<td>• Coach the mentee to think more deeply about an issue or concern and model reflective practice</td>
<td>• Identify colleagues with expertise</td>
</tr>
<tr>
<td>• Facilitate conversations to keep the focus on learning</td>
<td>• Be open to new ideas</td>
</tr>
<tr>
<td>• Inspire and build trust</td>
<td>• Engage in reflective practice</td>
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<tr>
<td></td>
<td>• Celebrate success</td>
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</tbody>
</table>

Trust is essential to the mentoring relationship. Without trust, a mentee will be uncomfortable seeking help or revealing areas of concern. Why is trust critical to mentoring?

The following skills and characteristics are the building blocks of trust.

Integrity

• Shows confidence in others' abilities
• Maintains a strong focus on teaching and learning
• Is committed to personal success for self and others

Collaboration

• Is open minded
• Works with others in improving their practice
• Creates a comfortable environment that supports sharing of ideas

**Ability**

• Advocates for others
• Communicates accurately, openly and honestly
• Strives to be knowledgeable

**Communication**

• Listens attentively to others’ ideas
• Uses communication skills to promote open discussion
• Listens to and values what others say
• Actively encourages others

**Compassion**

• Treats others with respect
• Displays compassion for others
• Respects others’ time

**Commitment**

• Keeps promises and commitments

Acts consistently and responsibly

**Snapshot**

Here is how one school leader plays the role of a mentor—helping a colleague plan and implement a school initiative:

At an Innovative Schools conference, Jan and Sophiana discuss the importance of supporting innovative teachers in their schools. They agree that teachers need opportunities to collaborate, share their expertise, and create a detailed vision of 21st Century teaching and learning. Sophiana learns that at Jan’s school, teachers work together in study groups to improve teaching and learning. Sophiana asks if Jan would be willing to mentor her as she explores ways to use study groups in her school. Jan agrees and they decide to e-mail and meet online as a first step in the mentoring process.

**Apply**

**A. Review Possible Roles and Responsibilities**

Mentors play various roles depending on their expertise and experience. Mentors’ roles change depending on the mentee’s needs and experience. Often a mentor will move in and out of these various roles as the need arises.

Consider these roles:

The **expert**, demonstrating or explaining how to do something. For example:

• Provide expertise on research-based strategies to improve instruction.
- Assist in implementing a school initiative such as study groups or a coaching program.
- Share experiences by using a video camera to record an event so that the mentee can learn by example.
- Provide guidance in designing a method to evaluate the effectiveness of staff development.

A **coach**, helping other leaders clarify goals, define success, and identify strategies to achieve the goals.
In this role, the mentor isn’t trying to solve the problem but is trying to clarify ideas. For example:

- Lead a planning meeting to clarify goals.
- Use communication skills to help a colleague think more deeply about an issue.
- Lead a reflection meeting to help a colleague identify successes, challenges and next steps.
- Help a colleague make a decision.

A **collaborator**, helping to plan and implement an activity. For example:

- Collaborate with a colleague to research and implement new strategies for improving leadership in schools.
- Jointly create a plan to move towards school-based, ongoing staff development in your schools.

A **facilitator**, guiding group discussions and leading meetings. For example:

- Lead an online meeting to help a group use a protocol to examine its work.
- Guide an online discussion on a research article related to creating an innovative culture in schools.

**B. Identify Possible Roles and Responsibilities**

Review the possible mentor roles and responsibilities listed under Part A and identify the key roles that you could play as a mentor. Give 3-4 specific examples related to your areas of expertise and interest.

**C. Review Mentee Roles**

Mentors say successful roles of a mentee include:

- Being open to learning and being helped.
- Taking ownership for one’s own learning.
- Being committed to learning and following through on tasks.
- Feeling comfortable about taking risks and making mistakes.
- Belief in the power of professional dialogue.

**D. Identify Mentee Characteristics**

Review the list of mentee roles listed above. Which of these roles would you use to describe yourself? What are other roles that you would add to this list?
Reflect

Reflection 1: How a Mentor Could Help You

Think about your needs as a leader at an innovative school. Do you need help making classroom learning more innovative, or do you want to strengthen your skills as an innovative leader? Define the issue that is the highest priority for you to today.

Using the list of mentors’ roles above, describe four or five roles a mentor could play to help you grow as a leader.

Reflection 2: Identify Mentor Strengths

Make a list of the attributes of an effective mentor and then share the list with others in your community on the Innovative Educators Web site. For example, you might include “Willing to be flexible in how and when mentoring happens” on your list of mentor attributes.

Additional Resources

Read Dear Gayle, Dear Sheryl: Using e-mail for a principal mentorship. This article was written by Sheryl Boris-Schacter and Gayle Vonasek, two principals who used e-mail in a mentoring relationship. Although their relationship involved an experienced principal mentoring a first year principal, it shows how e-mail can be used effectively in any mentoring relationship.
Setting Group Norms

*What norms might make your work with other school leaders more effective?*

**Description**

Creating guidelines or norms for group behavior makes collaboration and group meetings effective.

The process of setting group norms involves four steps: clarify the purpose of norms, discuss norms, set group norms, and then make the use of norms routine.

In this activity, you will

- Learn about ways to set norms.
- Practice setting norms.

**Snapshot**

Here is how one school leader uses norms in his ongoing collaborative work with colleagues:

Lee and three other administrators meet twice a month to exchange ideas and give each other practical advice on school issues they believe will make their schools more innovative. They often read and discuss journal articles and help each other develop new skills and knowledge. At other times they discuss efforts they are making to change school culture or learning activities that will improve academic achievement. Together the group sets these norms to use in their meetings:

- Use our time effectively.
- Prepare for the meeting.
- Build on each other’s ideas.
- Probe ideas.

The norms are included in each meeting agenda, and if they are meeting face to face, the leaders post the norms so they are visible during the meeting. The group starts each meeting by reviewing the norms and then concludes the meeting by asking “How did the norms help us work effectively?” At first the group wondered if the explicit use of norms would feel contrived, but they soon found that norms helped the group hold more effective meetings.
Apply

Use these steps to set group norms with a group of school leaders or teachers you meet with regularly.

Step 1 Clarify the purpose of norms

Norms serve a number of purposes. Norms help us work better or more effectively as a group. By setting norms we are accepting ownership for how we work as a group. Our norms also assure we are prepared for each meeting and focus on discussing key ideas in a respectful and supportive way.

Step 2 Discuss norms

Have a group discussion around the question: **What are some group norms that will help us be effective?**

- Assign a facilitator and recorder.
- Use the Example Norms below to guide your discussion.
- Group members share suggested norms and then describe how the norm was effective in a meeting.
- The recorder will take notes as you brainstorm.

Example Norms:

<table>
<thead>
<tr>
<th>Begin on time</th>
<th>Listen attentively</th>
</tr>
</thead>
<tbody>
<tr>
<td>End on time</td>
<td>Attend to goals and objectives</td>
</tr>
<tr>
<td>Attend all meetings</td>
<td>Listen respectfully</td>
</tr>
<tr>
<td>Respect questions</td>
<td>Discuss issues, not people</td>
</tr>
<tr>
<td>Monitor your talking time</td>
<td>Probe ideas, do not criticize people</td>
</tr>
<tr>
<td>Stay on agenda</td>
<td>Show respect for views of others</td>
</tr>
<tr>
<td>Do assignments prior to meetings</td>
<td>Avoid side conversations</td>
</tr>
<tr>
<td>Hold yourself personally accountable</td>
<td>Assume positive intentions</td>
</tr>
<tr>
<td>Do not use hostile language</td>
<td>Build on each other’s ideas.</td>
</tr>
<tr>
<td>Respect the group</td>
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</tbody>
</table>

Step 3 Set group norms

- Since your list may be fairly long, discuss which four or five norms are the most important and why.
- Try grouping like ideas so that there are fewer norms.

Step 4 Make the use of norms routine

- Post your norms in a visible space or in meeting agendas.
- Start each meeting by reviewing your norms.
- Decide how group members should respond when a norm is not being used by the group. Discuss whether each group member, or only the facilitator of the meeting, should be responsible for enforcing the use of norms.
At the conclusion of your work session, revisit the norms and have a group discussion around these questions: Did we follow our norms, how did the norms help us be effective, and is there a norm we should add or delete?

Add and delete norms as needed so that your group is effectively working together.

**Reflect**

**Reflection 1: Effective work sessions**

- Describe the most effective work session you have experienced.
- What made it effective?
- Describe a work session that you believe wasted your time. What were the default, unspoken norms that made it a negative experience?
- Describe how the use of group norms might have improved the experience.
- How can you apply the information you learned about setting group norms to your work?

**Reflection 2: Effective Group Members**

Rank the following according to your strengths and weaknesses and then write a reflection about how you could become a more effective group member.

- I encourage all group members to share their ideas.
- I monitor the amount of time that I talk.
- I use probing questions and paraphrasing to clarify ideas.
- I stay on task and follow the agenda.
- I use research to back my ideas.

Considering my strengths and weaknesses, how can I make myself a more effective group member?

**Additional Resources**

[Norms of Collaboration](#)

Robert Garmston and Bruce Wellman have identified seven norms for collaboration. These norms are specific behaviors related to communication skills. The norms help mentors build a trusting culture, encourage inquiry, and provide a way to deal with conflict.
Explore Communication Skills

How can you mentor another school leader to think more deeply about a topic?

How can communication skills help us collaborate more effectively as we work with other educators to make our schools more innovative?

Description

Communication skills help school leaders develop trust and build mentoring relationships. All school leaders have communication strengths and weaknesses. The most effective mentors work continuously on developing their communication skills further. They find this makes them more effective at collaborating with other school leaders and teachers to foster innovative teaching and learning.

In this activity, you will

- Learn about communication skills.
- Practice communication skills in a mentoring context.

Snapshot

Here is how one school leader uses communication skills in her work to foster meaningful discussion about innovative teaching and learning activities:

At a meeting with other school administrators from her district, Janice begins the school year by talking about innovation, which is a focus for the group’s work. To develop a clearer sense of innovative teaching and learning, she asks the group to break into groups of 4-6 and discuss the most innovative activities they experienced when they were learners. She models, with a small group of volunteers, how to ask clarifying and probing questions, and then directs the groups to practice using both types of questions during their discussions.

Apply

A. Learn Communication Skills

Communication skills help mentors earn trust and inspire others to think more deeply about innovative teaching and learning. You will learn and practice communication skills in this activity.

Read and reflect on the communication skills found on the Communication Skills Cue Card:
Communication Skills Cue Card

Active Listening
Is focused on the speaker.
Is blocking out all competing thoughts.
Is leaning forward and nodding.

Paraphrasing
Is restating what was stated.
Is used to check for understanding.
Clarifies what was heard by summarizing.
Indicates acceptance and encouragement.
Establishes relationship between speakers.
◆ So . . .
◆ So what you are Wondering is . . .
◆ As you . . .
◆ So your hunch is . . .
◆ You’re thinking . . .

Clarifying Questions
Lead to a clear picture or understanding of a topic or idea.
Are factual.
Are answered quickly.
Are used to gather information.
◆ How did you . . .?
◆ What . . . ?
◆ How did . . . ?

Probing Questions
Are thought provoking and encourage deeper thinking.
Usually start with a paraphrase.
Are often open-ended.
◆ You said . . ., have you ever thought about . . . ?
◆ Why . . . ?
◆ What might the next step be?
◆ What did you learn from that?
◆ Are there other strategies that you could use to . . .?

B. Practice Communication Skills

Introduction

A skillful school leader mentor uses communication skills to encourage school leaders or teachers to think more deeply about innovation. The goal of this exercise is to help school leader mentors to gain expertise in using these important mentoring skills by explicitly practicing paraphrasing, asking clarifying questions, and asking probing questions.

Protocols are guidelines for conversations that can help mentors to keep discussions focused. We also use protocols because they provide a structure for collaborative work and help build trust. As mentors become knowledgeable about the use of protocols they may use them with a variety of groups.

This entire exercise should take no longer than 25 minutes for one speaker. Prior to starting the activity outlined below, the participants should get out a pencil, sticky notes, and the Communication Skills Cue Card.

Directions

1. Take a few minutes to write a description of a project or issue you are currently working on in your school related to promoting innovative teaching and learning practices. Your description might include the following elements:
   - Who have you been working with and when?
   - What is the focus of the work?
   - What particular challenge or dilemma are you facing related to this issue?

2. Move into groups of four to six participants.

3. Identify the following roles:
   - A facilitator to walk the group step by step through the protocol and keep everyone focused during the activity. The facilitator helps the participants follow the protocol by redirecting participants as needed.
   - A timekeeper to move the discussion along.
   - A speaker who uses notes to talk about her or his mentoring program,

4. The speaker describes the issue related to promoting innovative teaching and learning, including background information, and a challenge or dilemma faced by the speaker.

5. Three people take turns paraphrasing the speaker.

6. Three people ask clarifying questions. The speaker answers these questions.

7. Each group member takes a few minutes to write down a probing question on a sticky note. Participants may refer to the Communication Skills Cue Card to develop the probing question.

8. Each person in the group reads a probing question aloud, then hands the speaker the sticky note. The speaker does not respond.
9. The speaker considers all the questions and then tells the group which probing question caused him or her to think the most deeply about his or her dilemma.

10. If time allows, another participant becomes the speaker, and the process is repeated.

**Debrief**

Debrief the protocol in your small group using the following questions:

- What was helpful about the protocol process?
- What was difficult?
- How could you use the protocol in other settings?
- How do you think communication skills build trust?

Adapted from the Probing Question Exercise and used with the permission of the National School Reform Faculty.

**Reflect**

**Reflection 1: Communication skills in action**

- Recall two discussions you have observed or been a part of: one in which communication flowed smoothly, and another in which there was little or no effective communication.
- What created the different results? If you could “fix” the ineffective discussion now, what would you “prescribe”?
- Pinpoint a relationship, an upcoming discussion, or a meeting in which you perceive room for improvement in how communication skills are used.
- How can you take what you learned from the Explore Communication Skills resource and apply it to the relationship, upcoming discussion, or meeting?

**Reflection 2: Communication preferences and current habits**

Rank the following according to your preferences and current habits; then write a reflection about how you could become a more effective communicator.

___ I frequently paraphrase others’ ideas.

___ I tend to ask a lot of clarifying questions.

___ I often lead with probing questions.

___ I practice active listening even in situations where many distractions are present.

Given my preferences and current habits, how can I become a more effective communicator?


**Additional Resources**

- For a broader look at communication skills with a bit more of a business perspective, review [How to Build and Practice Communication Skills](#).
- To learn about a mentoring skill beyond those highlighted in this activity, consult [How to turn conflict into a resource](#). Note the author’s core assumption (“...substantive, issue-related differences of opinion...tend to improve faculty effectiveness”) is supported with interesting ideas such as an “Assumption Wall” for use with groups.
Facilitating Online Discussion

How can participating in and leading online discussions help my mentoring efforts?

Description

Student, teacher, and administrator relationships, which for years have occurred in a face-to-face environment, increasingly involve an electronic or at-a-distance element. You will likely either mentor or be mentored at a distance. Learning and practicing online discussion skills can help a mentor obtain better results.

This activity is designed to prepare school leaders to participate in and facilitate online discussions effectively. In this activity you will:

- Learn about some common challenges in at-a-distance collaboration.
- Practice responding to one or more of these challenges, usually in the role of discussion facilitator.

Snapshot

Here is how one school leader responds to a challenging moment in an online mentoring discussion:

Tom, as part of a group of school leaders, has agreed to facilitate and start the group’s online discussions. On Monday, Tom posts a reflective message that discusses his efforts to create a collaborative culture that will support and encourage teachers’ efforts to make their learning activities more innovative. In Tom’s message, he asks for feedback on two specific parts of his innovation efforts: first, his decision to schedule time for the whole staff to explore one another’s teaching activities at weekly staff meetings; and second, his decision to encourage teachers to discuss their innovation work with the school leader in one-on-one meetings.

By Wednesday, one other school leader posts, writing “Nice message—got us going.” Tom isn’t sure if he should respond, and what he might say. Then on Thursday, another school leader posts, saying, “I could tell you are getting some good results. Keep up the good work, Tom.” Frustrated, Tom consults his handbook and an online resource about online facilitation, then crafts and sends the following short e-mail that he also posts in the discussion board:
Hi folks:

Jana and Tomas have responded to the initial ideas about encouraging a culture of innovation. Our discussion, which we’ve agreed will last until early next week, could use some of your thoughts. I am particularly interested in what you think of having teachers explore innovative activities as a whole staff. And in having teachers and the school leader discuss innovative activities one-to-one. Am curious if you think one or both of these ideas is workable, problematic, or something else? If you have any relevant experience or ideas to share, you will be helping me and my teachers quite a bit. All suggestions, probing questions, and other ideas are welcome.

Hope to see your ideas online!

Tom

Within a couple more days, Tom starts to see substantive posts with specific ideas, questions, and opinions about the two issues he had raised. These ideas help Tom think more deeply about his innovation efforts; he decides to pursue both ideas and evaluate their success at the semester break. After reviewing several thoughtful posts, Tom posts again and concludes the discussion, citing several of the ideas that have helped deepen his thinking.

Apply

A. Learn about common challenges in at-a-distance discussion / activities

Here are five typical challenges mentors may face when participating in or leading online activities, including discussion:

1. How can a mentor who is facilitating discussion respond to plenty of posts, but hardly any content?
2. Why do mentors need to moderate online discussion?
3. What can a mentor do if no one posts to an online discussion?
4. If other mentors (or mentees) are anticipating feelings of isolation, or are otherwise unenthusiastic when a mentor prepares to lead an activity at a distance, what can the facilitator do?
5. How might a facilitator address a serious, incorrect assumption in an online discussion?

B. Practice responding to one or more at-a-distance challenges

Directions

1. Read the mentoring principles, and the five detailed challenges below.
2. If you would like to learn or review some basic ideas for leading online discussion before working on the challenges, scan the Australian Flexible Learning Framework’s What we have learnt about...Effective Online Facilitation, particularly the sections titled Why is it [online facilitation] important?, The role of the facilitator, and Lessons Learned.
3. Join a 4-6 person group.

4. Spend no more than 20 minutes developing solutions to two challenges, including the first, required challenge. Record your notes and solutions in the space provided. Keep the mentoring principles listed below in mind, and address all of the challenge-specific questions. Use all of your mentoring resources and professional experience to develop solutions to challenges.

5. Present one of your team’s solutions to the large group. Each team will spend no more than 3 minutes presenting their solutions. Ask, after presenting a solution, if another group has a different approach to the same challenge.

6. Discuss the at-a-distance mentoring challenges and proposed solutions as a whole group. Ensure that at least one solution is discussed for each challenge.

**Mentoring principles**

- Mentors continuously seek to understand participants’ individual interests and needs.
- Mentors focus on their mentoring roles, responsibilities, and goals while providing flexible, responsive, and individualized mentoring.
Challenges

1. How can a mentor who is facilitating discussion respond to plenty of posts, but hardly any content? (Required)

During an online discussion between a group of school leaders who are mentoring one another, there are six contributions by the end of the first week. Four of the six contributions are little more than cursory, superficial comments. Two are in fact two words each: "Good post!" and "I agree!"

A school leader who has not yet posted to the discussion board, e-mails the lead mentor and complains that the online discussion is superficial and a waste of time.

What might the facilitator say in an e-mail response to the other school leaders? What are some things the facilitator might post on the discussion board and/or send in an e-mail to the whole group, to encourage better / deeper discussion? Are there resources the facilitator can use in preparing her remarks, or that she can point out to facilitators in the e-mail / post?

Record your challenge notes, solution ideas, and reflections below:

[Tip: Review the Facilitating Online Discussion Snapshot and Tom’s solution—his e-mail / discussion board post—to see some possible ways to respond when there are not many substantive posts being made.]
2. Why do mentors need to facilitate online discussion?

As a group of school leaders is finishing a productive face-to-face work session, there is a proposal to continue the work online in a discussion forum. One of the mentors volunteers to host the discussion in his private community on the Innovative Educators Web site. As the discussion ends, and the meeting is about to break up, it occurs to you that it might be important to have one person in the group guide and lead the discussion. Before you speak up to propose this idea, you realize your fellow mentors (and mentees) will want to hear several reasons why there should be a discussion facilitator.

**What might you say to the group to convince them that having a facilitator guide the discussion might be productive? Are there any examples or resources you could point to in order to make your case?**

**Record your challenge notes, solution ideas, and reflections below:**

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Innovative Schools Program

*Mentoring Handbook for School Leaders – Facilitating Online Discussion*
3. What can a mentor do if no one posts to an online discussion?

Two weeks after a productive face-to-face meeting of school leaders who have agreed to continue their work online in a discussion forum, there are no posts.

**What might the facilitator say in an e-mail to the group, and/or in a post to the discussion forum, to encourage participation? Are there any resources the facilitator could use to prepare his or her response?**

**Record your challenge notes, solution ideas, and reflections below:**

[Tip: Review the Facilitating Online Discussion Snapshot and Tom’s solution—his e-mail / discussion board post—to see some possible ways to respond when there are not many substantive posts being made. Although Tom’s solution is for a situation in which there are only a few, non-substantive posts, many parts of Tom’s solution may also be used when there are no posts being made.]
4. If other mentors (or mentees) are anticipating feelings of isolation, or are otherwise unenthusiastic when a mentor prepares to lead an activity at a distance, what can the facilitator do?

As a mentor who has volunteered to facilitate an online activity announces to the group that the activity will begin the following week, most of the other school leaders seem excited and interested. However, some of the other school leaders are anticipating that it may not go well. In fact, at a face-to-face session of the school leaders, one speaks up and shares his concerns:

"I've taken several online courses in the past couple of years, and none of them has been great. In fact, in each of them, I've felt a sense of isolation and distance from the other participants and the facilitator—we never really felt like a community, the facilitator was not very active, and I didn't learn as much as in face-to-face workshops I attended. So I'm concerned that we might experience the same thing.

What might the facilitator say to this school leader and the group to address the concerns respectfully in a way that is reassuring? Are there relevant resources the facilitator can use in preparing for comments like this, or can use to point out to school leaders in the moment?

Record your challenge notes, solution ideas, and reflections below:
5. How might a facilitator address a serious, incorrect assumption in an online discussion?

Within the first two weeks after a productive face-to-face workshop of school leaders, there has been plenty of substantive online discussion. Unfortunately, at least three of the posts appear to be based on the notion that "anything goes in mentoring, including telling mentees to ‘figure it out’ and micro-managing mentees—taking ownership of their challenges." You, the facilitator, are concerned and want to correct this impression. You would like to find a way to lead the discussion in a more-productive direction.

What are some things a facilitator might post in an intervention to highlight the incorrect assumption, let the group wrestle with it, and not dampen enthusiasm for discussion? Are there relevant resources the facilitator can use in preparing a post like this, or can refer to in the post itself?

Record your challenge notes, solution ideas, and reflections below:
Reflect

Reflection 1: Communication Skills at a distance

- Which of the communication skills explored earlier in this handbook—active listening, paraphrasing, clarifying questions, probing questions—will be most useful as you participate in online discussion?
- Which will be most useful as you facilitate or guide online discussion?

Reflection 2: At-a-distance challenges

- Which of the following at-a-distance challenges is likeliest to occur in your mentoring context?
- Which challenge, if it occurs, would be most difficult for you to address?

1. How can a mentor who is facilitating discussion respond to plenty of posts, but hardly any content?
2. Why do mentors need to moderate online discussion?
3. What can a mentor do if no one posts to an online discussion?
4. If other mentors (or mentees) are anticipating feelings of isolation, or are otherwise unenthusiastic when a mentor prepares to lead an activity at a distance, what can the facilitator do?
5. How might a facilitator address a serious, incorrect assumption in an online discussion?

Additional Resources

- For a broad survey providing information and resources about facilitating online discussion, see the Australian Flexible Learning Framework's What we have learnt about...Effective Online Facilitation. Includes links to many additional resources.
- As you work with teachers, some of them may want to guide—or may already be leading—activities online, including discussion. From one of the pioneers in making online activities rich and meaningful, Why Don't Face-to-Face Teaching Strategies Work in the Virtual Classroom? offers thought-provoking ideas for cutting-edge teachers.