

Mentoring and Coaching for New Leaders

Summary Report | Spring 2003



A review of literature carried
out for NCSL by **Andy Hobson**
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National College for School Leadership

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Executive Summary

Introduction

Mentoring and coaching for executives have become very big businesses in recent years, especially in the United States and increasingly so in the UK (Clutterbuck, 1999). The use of these techniques in educational contexts has also grown, most notably in relation to new teachers, but also in relation to the training and induction of educational leaders. The purpose of this review was to investigate:

- what mentoring and coaching strategies have been/are being used to assist the development of new leaders, both in the UK and internationally, in the education and non-education sectors.
- what the evidence tells us about the effectiveness of mentoring and coaching strategies to assist the professional development of new headteachers in their first headship, where 'new headteacher' refers to the period between appointment and the end of the second year in post.

Key findings

What is meant by the terms 'mentoring' and coaching'?

The terms 'mentoring' and 'coaching' mean different things to different people. Whilst some authors use the terms interchangeably, 'mentoring' is more generally used to refer to a process whereby a more experienced individual seeks to assist someone less experienced, and 'coaching' is used to refer to forms of assistance relating more specifically to an individual's job-specific tasks, skills or capabilities, such as feedback on performance.

It is important to recognise that the forms mentoring and coaching might take in practice may be influenced by a wide range of factors, including the relative degrees of experience and expertise of mentors and mentees, and their personal characteristics.

Which mentoring and coaching strategies have been employed to assist the development of new headteachers?

Research suggests that most mentoring of new headteachers is carried out by more experienced heads, while some is carried out by inspectors, advisers and consultants. Contact between mentors and mentees can occur in different ways, including face to face meetings, telephone conversations, school visits and group meetings with other mentor-mentee pairs.

The main roles adopted by mentors include:

- assisting new heads to solve their own problems
- acting as a catalyst or sounding board
- providing linkage to people or resources
- discussing various topics relating to school management
- offering solutions to the new head's problems.

Mentoring provision is sometimes described as peer support. Some mentor and mentee pairs produce a jointly agreed agenda to which they work. Typically, headteachers have mentors from the same (primary or secondary) phase of schooling.

Is mentoring and coaching of headteachers effective?

Research evidence relating to mentoring is more freely available than that relating to coaching in the narrow sense of the term. All major studies of formal mentoring programmes for new headteachers have concluded that such mentoring work was effective. For example:

- the large-scale evaluation of the Headteacher Mentoring Pilot Scheme in England and Wales found that 66 per cent of the new heads and 73 per cent of mentors rated the mentoring process as 'successful' or 'very successful' (Bolam et al, 1993)
- 80 per cent of new principals involved in a similar scheme in the U.S. stated that the mentoring programme had been 'helpful' or 'very/extremely helpful' (Grover, 1994).

The benefits of mentoring

Evaluative studies suggest that mentoring of new headteachers can result in a wide range of benefits, particularly for the mentee, but also for the mentor, schools and the educational system in general.

The potential benefits for new headteachers are reported to include:

- reduced feelings of isolation
- reduced stress and frustration/therapeutic benefits
- increased confidence and self-esteem
- the opportunity to reflect on the new role
- an accelerated rate of learning
- improved personal skills, including communication/political skills
- improved technical expertise/problem analysis
- friendship

Benefits reported to be experienced by mentors include:

- benefits to their own professional development
- improved performance/problem analysis
- insights into current practice
- awareness of different approaches to headship
- increased reflectiveness
- improved self-esteem

Factors influencing the success of mentoring programmes for new headteachers

Research suggests that a range of factors are likely to impact on the effectiveness of mentoring schemes for new leaders. These include:

- the availability of time in which to undertake mentoring
- the matching/pairing of mentors and mentees
- the qualities/attributes of mentors
- whether or not mentors are trained, and the nature of such training

The place of coaching in the induction of new heads

Some mentors and mentor training providers have questioned the appropriateness of coaching as a means of inducting and training new headteachers. However, this issue is unclear, partly as a result of a lack of a shared understanding of the meaning of the term 'coaching'.

The provision of practical advice and 'solutions'

The evidence suggests that many new headteachers value the provision of practical advice and the support of mentors who are prepared to offer 'solutions' to their problems. Whilst some mentor training courses have explicitly discouraged mentors from offering solutions to the new heads' problems, some writers suggest that the provision of practical advice is a necessary, early stage in the mentoring of new heads.

Conclusions

The findings presented in this review identify a range of mentoring and coaching practices employed both in relation to the induction of newly appointed headteachers and in other educational and non-educational settings. The weight of the evidence suggests that, where they are practised, such processes tend to be effective and to bring a range of benefits for both mentees and mentors/coaches.

However, it is important to recognise that the evidence for the effectiveness of mentoring and coaching, and evidence which points to the benefits of such approaches, is based predominantly on the perceptions of participants who have been involved in mentoring and coaching relationships, notably the mentors and mentees themselves. Whilst the perceptions of the key participants must undoubtedly be central to any evaluation, these do not necessarily tell the whole story. It would be beneficial for further research to be conducted, which seeks to establish the subsequent impact of mentoring and coaching on the performance of heads.

About the study

The review entailed a systematic search of databases of literature (including books, published articles, reports and conference papers) published in the UK and other English speaking countries since 1982. Eleven educational/social science databases were searched for relevant studies, along with selective internet and hand searches. All retrieved texts were subject to a preliminary review, in order to establish more fully their degree of relevance to the aims of the study. Studies of the highest quality were then subjected to a full critical review. In total, 24 full reviews were undertaken, and critical summaries produced. All data from the critical summaries were analysed and the findings synthesised to address the questions identified at the outset of the review.

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1. Introduction

1.1 Mentoring and coaching: exploring the meaning of the terms

The terms 'mentoring' and 'coaching' mean different things to different people. To most commentators, however, mentoring is the broader of the two concepts. Clutterbuck (1992) says that:

'A mentor is a more experienced individual, willing to share his/her knowledge with someone less experienced in a relationship of mutual trust.'

Kram (1985) writes that mentoring includes, on the one hand, a career progress-oriented dimension and, on the other hand, psycho-social development functions, incorporating counselling and friendship. In a similar vein, Bush et al (1996) note that mentoring may include 'peer support, counselling, socialisation *and coaching*' (Bush et al, 1996; emphasis added).

It follows from the above that coaching tends to be seen as a form of mentoring, or as one aspect of mentoring, but having a more narrow focus, notably relating to an individual's job-specific tasks, skills or capabilities (Hopkins-Thompson, 2000). Green et al (1991) suggest that coaching involves 'a focus on skills and competencies in action and feedback on performance' (Green et al, 1991), whilst Megginson and Boydell (1979) describe coaching as:

'an on the job activity which refers to the process where one person gives guidance to another so as to help improve his or her performance.'

Finn notes that 'mentors act as coaches to help develop protégés' skill and capabilities' (Finn, 1993).

Clutterbuck concurs with the broad conceptualisation of mentoring and narrower conceptualisation of coaching outlined above stating that 'coaching often slides into mentoring when discussion and dialogue move onto wider, more personal issues' (Clutterbuck, 1998).

However, not everyone subscribes to the 'mentoring broad/coaching narrow' conceptualisation, and some commentators and practitioners appear to use the terms interchangeably. Popper and Lipshitz (1992), for example, suggest that coaching involves not merely a focus on 'skills and competencies in action', but also on 'psycho-social' aspects via which focusing upon skills and competencies in action might be more productive:

'Coaching has two components: (1) improving of performance at the skill level; and (2) establishing relations allowing a coach to enhance his [sic] trainee's psychological development.'

'It is also important to recognise that the forms mentoring and coaching might take in practice may be influenced by a wide range of factors, including the relative degrees of experience and expertise of mentors and mentees on the one hand, and the personal characteristics of mentor/mentees on the other. In particular, due to the relatively 'equal standing' of both parties (Bush et al, 1996), the mentoring of one headteacher by another may differ from other mentor-mentee relationships, such as those in initial teacher training (ITT), which tend to be characterised in 'expert-novice' terms.'

1.2 The increased popularity of mentoring and coaching

Mentoring and coaching for executives have become very big business in recent years, especially in the United States but increasingly so in the UK (Clutterbuck, 1999). Forret et al (1996) state that the implementation of formal mentoring programmes in organisations has grown markedly, whilst James Belasco writes that 'coaching now occupies a place of honour on the management stage [and] is destined to be *the* leadership approach of the twenty-first century' (Belasco, 2000).

The increased use and influence of mentoring in the business world has been followed by a growth in its use in educational contexts, most notably in relation to the training of new teachers in school-based settings (Tomlinson, 1995; Hobson, 2002), but also in relation to the training and induction of educational leaders. This has been most marked in relation to pre-headship training. For example, since 1984, Singapore has had a compulsory full-time training programme for aspiring principals (the Diploma in Educational Administration), where mentoring by experienced headteachers forms a central part of the programme (Coleman et al, 1996; Low, 1995; Walker et al, 1993). Elsewhere, programmes developed for newly appointed principals, involving greater or lesser degrees of different forms of mentoring and coaching, have been introduced in Chicago (the Leadership Initiative for Transformation (LIFT) programme), New South Wales and New Zealand (Bush and Jackson, 2002).

1.3 Mentoring and coaching for school leaders: the UK policy context

Formal mentoring schemes for new headteachers in England and Wales were introduced in January 1992, when the School Management Task Force initiated the Headteacher Mentoring Pilot Scheme. Funds were provided to 10 consortia of LEAs to train experienced headteachers to mentor new heads, and the scheme ran for 18 months.

Since the introduction of the Headteachers' Leadership and Management Programme (HEADLAMP) in 1995, headteachers (or their chair of governors) have been provided with funds (currently £2500 per annum) to spend on leadership and management programmes of their choice, following an initial needs analysis. Mentoring may or may not form part of such training, though some LEAs have established mentoring schemes for new heads and have encouraged governors/headteachers to participate in such schemes and to make a financial contribution via their HEADLAMP allocation.

The National College for School Leadership (NCSL), which assumed responsibility for HEADLAMP in April 2001, is currently piloting the New Visions: Induction to Headship programme, a four-term programme which seeks to provide new heads with:

'access to a tailored knowledge base ... coaching, peer mentoring, e-networks, shared enquiry and group problem-solving activities.'

(Tomlinson, 2002)

The interest in mentoring and coaching as means of assisting the professional development of new headteachers reflects a number of issues and concerns. On the one hand, research indicates that many new headteachers experience a range of problems, including managing their time, coping with a range of tasks, addressing issues arising from education policy of national government, and dealing with low teacher morale and commitment (Bolam et al, 2000; NCSL 2002). On the other hand, research has also called into question the usefulness of previous/existing means of inducting and assisting new heads. For example, research by Earley et al (2002) found that only about one in six (17 per cent) of new headteachers thought that they were 'very prepared' for headship, with nearly one in ten indicating that they were 'not prepared at all'. And on the basis of inspections of the arrangements for the induction of new headteachers in 43 LEAs and visits to 165 headteachers during the academic year 2000-2001, Her Majesty's Inspectorate (HMI) state that:

'The quality of induction support was judged to be good in 10 LEAs, satisfactory in 14, unsatisfactory in 14 and poor in five.'

(OFSTED, 2002)

Whilst such evidence suggests that the training and induction of new headteachers might be improved, it does not make a specific case for the use of mentoring and/or coaching as one means of attempting to make such an improvement.

1.4 Why mentoring and coaching?

A number of influential theories of professional learning point to the learning potential of having professionals work closely with experienced practitioners acting as 'mentors' or 'coaches', and such theories provide insights into the different forms that effective 'mentoring' might take. New headteachers need to develop new skills and to extend skills developed in their earlier teaching and management careers. Drawing on work conducted in the field of cognitive skill psychology, Sloboda (1986) argued that 'real life skills... are usually learnt with the aid of some form of coaching', and suggested that appropriate feedback on practice was 'essential to skill acquisition' (Sloboda, 1986).

Support for the learning potential of mentoring and coaching can also be found in Vygotskian and 'socio-cultural' perspectives on learning, which are premised on the notion that human activities are rooted in social participation and learned not in isolation but with the assistance of others (Rogoff, 1995; Wertsch, 1991; Sharp and Gallimore, 1988).

A third source of support for the learning potential of mentoring for new headteachers comes from constructivist theory and related work on learning styles. Many writers and much previous research have demonstrated that learners' preconceptions and expectations are a major influence on their subsequent learning, as is the extent to which programmes of learning are tailored to the learning styles and preferences of the learners (Ausubel, 1968; Duit, 1996; Feiman-Nemser et al, 1987). It is thus significant that, as Thody (1993) notes, 'in the past many principals have sought informal mentorship, or "buddy schemes".'

Whilst theoretical work points to the learning potential of the use of mentoring and coaching, what of evidence of their effectiveness in practice?

For a number of years mentoring in general has been associated with a wide range of benefits. As Hansford et al (2002) put it:

'Mentoring has been linked to a range of consequences ranging from career advancement and heightened self-confidence, to an increased sense of belonging. Indeed, literature exists which suggests that mentoring is a panacea for a variety of personal and social ills.'

(Hansford et al, 2002)

Indeed, in their recent review of literature on business mentoring, Hansford et al (2002) did find research evidence (mostly from the United States) relating to many of these benefits and costs.

'More than half of the [151] studies noted that mentoring facilitated some kind of career enhancement among mentees. Many studies also noted that mentees benefited from specific strategies that mentors used in their interactions with mentees such as coaching, role modeling, as well as opportunities for involvement in challenging assignments. Other benefits for mentees in business included company socialisation, sponsorship and friendship. For mentors, rewards associated with mentoring typically stemmed from the establishment of networks, increased career satisfaction, improved workplace skills, and personal pride and satisfaction.'

(Hansford, 2002, p.113)

Douglas' (1997) review of the literature on 'Formal Mentoring Programs in Organisations' found that a similar range of benefits was reported. These included:

'From the protégé's perspective ... career advancement; assistance and feedback; personal support; protection; information; increased confidence; individualized attention; cultural socialisation and increased awareness of the organisation; stress reduction ... [and] improved networking...'

'From the organisational perspective ... increased productivity and motivation ... improved recruitment; increased organisational communication; improved succession planning; management development; reduced [staff] turnover; increased organisational commitment; and strengthening and continuance of corporate culture.'

(Douglas, 1997)

We cannot assume, however, that the benefits and costs of mentoring experienced by participants in one field will necessarily be the same as those experienced in another, especially since the nature of the mentoring strategies employed will and should differ to take account of differences in context. It might thus be the case that costs and benefits of peer mentoring are different from those in more traditional mentor-protégé relationships, and that any given strategies might produce different effects in relation to headteacher mentoring than they might elsewhere.

In his (1995) review of the research on mentoring for educational leaders, John Daresh concluded that:

'Despite repeated and persistent recent suggestions that mentoring programmes might serve as a central part of initial pre-service leadership preparation programmes, induction schemes, and ongoing in-service and professional development activities, however, there has been a remarkable lack of systematic analysis of this issue in the research literature.'

(Daresh, 1995)

This report outlines what is considered to be the 'best evidence' arising from a systematic review of research into mentoring and coaching for new headteachers and other leaders. More specifically, the review sought to investigate:

1. What mentoring and coaching strategies have been/are being used to assist the development of new leaders, both in the UK and internationally, and in the education and non-education sectors.
2. What the evidence tells us about the effectiveness of those mentoring and coaching strategies which are being/have been/may be used to assist the professional development of new headteachers in their first headship, where 'new headteacher' refers to the period between appointment and the end of the second year in post.

2. Types of Mentoring and Coaching

2.1 Mentoring and coaching strategies which have been employed to assist the development of new headteachers

The most detailed evidence regarding the types of mentoring carried out with new teachers relates to the Headteacher Mentoring Pilot Scheme in England and Wales, initially mentioned in Section 1.3 (Bolam et al, 1993, Bolam et al, 1995; Southworth, 1995; Pocklington and Weindling, 1996), to the mentoring of new headteachers in the English East Midlands (Bush and Coleman, 1995; Coleman et al, 1996), and to a mentoring programme for New York principals, introduced in the early 1990s (Grover, 1994).

The Headteacher Mentoring Pilot Scheme in England and Wales was introduced by the (then) Department for Education (DfE) in January 1991 and ran for 18 months. Responsibility for the programme was devolved to regional consortia, each governed by an executive committee of LEA officers and headteachers, and chaired by a headteacher. Funding was made available for training for mentors and mentees, and for cover to allow the mentoring process to take place. Volunteer new headteachers were matched with experienced headteachers who had volunteered as mentors and received preparatory training. Most heads did not actively choose their mentor, although some had exercised 'negative preference'. Most mentor-mentee pairings were based within the same LEA.

The mentoring process on the national pilot scheme could vary, but typically consisted of a formal linkage lasting for about a year, and aimed at addressing a jointly agreed agenda through meetings, telephone conversations and occasional school visits. The roles most commonly adopted by mentors were assisting the new heads to solve their own problems, acting as a catalyst or sounding board, and offering linkage to people or resources. Although some training courses had explicitly discouraged mentors from offering solutions to the new heads' problems, half the mentors had actually taken this step (Bolam et al, 1995). Southworth (1995) described the pilot scheme as operating on a model of mentoring as peer support: 'help given to newcomers by veterans'. He summarises the trainee mentors' perceptions of mentoring as a mutually beneficial process that is 'sympathetic, non-judgmental, non-evaluatory, and non-prescriptive' (Southworth, 1995).

Bush and Coleman (1995) and Coleman et al (1996) present the findings of a comparative study of mentoring schemes for new headteachers in England and a mentoring programme for aspiring principals in Singapore. Like their counterparts in Singapore, when asked to evaluate terms used to describe mentoring, the mentors in England preferred descriptors suggesting a two-way relationship, such as 'mutual learning' and 'collaboration'. 'Peer support' was rated most highly, with 70 per cent of mentors in England indicating that this was 'very appropriate'.

Grover (1994) explains how, in June 1991, a retirement incentive led to 217 vacancies for principals in New York City schools, many of which were filled with first-time appointees. To help the new appointees cope with their new responsibilities, the Bank Street College of Education implemented a mentoring programme. This had two components, an advisor (mentor) component and a 'buddy' principal component. In the first of these a retired New York City principal worked with selected newly assigned principals in an individual district, through a combination of individual and group meetings and, often, open access arrangements. The topics covered balanced general theory and local practice with individual needs. The optional 'buddy' component assigned beginning principals to selected established post-holders in the local school district. Contact between mentor and mentee took place on average more than five times a month, usually by telephone or individual meetings, though monthly group meetings were also held, which covered a range of topics relating to school management.

2.2 Mentoring and coaching strategies which have been employed in non-educational settings

As was the case in relation to the mentoring of headteachers/principals, a large number of articles make some reference to mentoring and coaching programmes employed in non-educational settings, yet provide relatively few details of the actual strategies employed (eg Newton and Wilkinson, 1993; Forret et al, 1996; Hall et al, 1999; Bassett, 2001). Relatively detailed accounts were provided by Kiel et al (1996), Peterson (1996) and Tobias (1996), who describe programmes of 'executive coaching' employed in the United States. It should be borne in mind that the programmes described here relate to the coaching of executives within rather than at the top of organisations, and that they are not concerned purely with *newly appointed* executives. Both of these factors may restrict the relevance and applicability of these schemes to the mentoring/coaching of new headteachers.

Kiel et al (1996) describe a structured programme of executive coaching designed to have a positive impact at the organisational level through focused work with the individual client. The senior executive development programme has three distinct phases:

Fact gathering includes in-depth interviews and a battery of psychological tests. Colleagues and significant individuals in the client's personal life (nominated by the client) are also individually interviewed.

Planning and consolidation begins with a two-to-three day 'insight session' during which the information gathered is presented to the client as a portrait which pinpoints strengths and shortfalls. This information becomes the basis for a development plan, which details specific and measurable goals and action steps.

Implementation begins with the client enlisting the help of the employing organisation in providing resources and support for achieving specific goals. The consultants or 'coaches' facilitate the development process and interview selected individuals at intervals in order to check and re-tune the client's goals.

The formal coaching relationship tends to continue for approximately two years, and ends when the client has developed a support mechanism for ongoing growth, which may include a coaching relationship with a sponsor or a more senior manager.

Peterson (1996) outlines three different categories of coaching offered by his consulting partnership in the United States: *targeted coaching*, described as a relatively focused, skills-based approach; *intensive coaching*, a comprehensive approach for individuals facing major work challenges; and *executive coaching*, a consultative, relationship-based service for senior executives.

Peterson identifies five research-based strategies that underpin his approach to coaching: (1) forge a partnership; (2) inspire commitment; (3) grow skills; (4) promote persistence and (5) shape the environment. Once trust and understanding have been built, the coach aims to build insight and motivation by assisting clients to identify discrepancies between their current and wished-for states, by reviewing their own abilities and goals, and assessing the perceptions and expectations of others. A range of approaches is said to be used to assist clients to acquire new skills and knowledge. The coach helps the individual to find opportunities for applying newly-learned skills; to manage the more mundane aspects of development; to fight the fear of failure; and to break the habit cycle. Finally, the coach works with the individual's organisation to identify and reduce barriers to development, or to guide sponsors on becoming better role models.

Tobias (1996) describes an approach to executive coaching which is not dissimilar to those outlined by Kiel et al (1996) and Peterson (1996) above, but which gives relatively more emphasis to a consideration of contextual factors and the need to involve other people within the organisation in the coaching process. In outlining the typical stages of a coaching process as practiced by his consulting partnership, Tobias stresses that most individual problems are system-related, and that other people may need to be involved in their resolution. An in-depth psychological study of the individual/client may lead on to gathering the perceptions of others, typically including the client's manager, relevant peers and subordinates, in which open-ended questions are designed to elicit constructive praise as well as constructive criticism. The findings of this exercise are then fed back to the subject, who is helped to understand them and stimulated to plan changes as needed. Meetings with the individual are often followed by discussions with her/his senior manager to further discuss possible beneficial input the manager can make in terms of facilitating the client's development.

3. Is Mentoring and Coaching of Headteachers Effective?

In Section 1 it was reported that a range of research evidence exists which points to the effectiveness of different forms of mentoring in non-educational contexts. Benefits for both ‘coachees’ and for organisations have also been reported in the studies of executive coaching referred to above (Kiel et al, 1996; Peterson, 1996; Tobias, 1996), and by Olivero et al (1997) and Hall et al (1999).

The three mentoring programmes for new heads (two UK, one US) outlined in Section 2.1 were all reported to have been successful (Bolam et al, 1993; Bush and Coleman, 1995; Grover, 1994). The evaluation of the Headteacher Mentoring Pilot Scheme in England and Wales (Bolam et al, 1993) is the largest study of headteacher mentoring undertaken to date, with data obtained from 238 new heads and 303 mentors involved in the scheme. In their questionnaire responses, 66 per cent of these new heads and 73 per cent of mentors indicated that the mentoring process had been ‘successful’ or ‘very successful’ (Bolam et al, 1993; Bolam et al, 1995). The findings from the survey are corroborated by those from case studies, reported by Pocklington and Weindling (1996).

In their study of ‘New Heads in the New Europe’, which included an examination of the support available to new headteachers in five countries (Hungary, the Netherlands, Norway, Spain and Wales), Bolam et al (2000) administered questionnaires to approximately 700 new heads (defined in this study as being in post for up to three years). Two thirds of the headteacher respondents rated informal support from local headteachers as helpful. Evidence that new headteachers value the support of other headteachers in general and more formal mentoring arrangements in particular is also reported by Blandford and Squire (2000), in their evaluation of HEADLAMP, by Brady (1993), and by Newton (2001).

It is important to stress that the vast majority of evidence regarding the effectiveness of mentoring new headteachers is based on data collected from the participants in the mentoring process, notably new heads/mentees and the mentors respectively. It is from the same sources that the reported benefits of mentoring, to which I now turn, are also largely derived.

4. The Benefits of Mentoring for New Headteachers

Evaluative studies of the mentoring of new headteachers suggest that mentoring can result in a wide range of benefits, particularly for the mentee, but also for the mentor and for schools and the educational system in general.

4.1 Benefits for new heads

The potential benefits for new headteachers of participating in headteacher mentoring, are reported to include:

- reduced feelings of isolation (Bolam et al, 1995; Bush and Coleman, 1995; Grover, 1994; Monsour, 1998; Draper and McMichael, 2000)
- reduced stress and frustration / therapeutic benefits (Grover, 1994)
- increased confidence and self-esteem (Bolam et al, 1993; Grover, 1994; Bush and Coleman, 1995)
- the opportunity to reflect on the new role (Southworth, 1995; Pocklington and Weindling, 1996)
- an accelerated rate of learning (Hopkins-Thompson, 2000)
- professional growth (Grover, 1994)
- improved personal skills, including communication / political skills (Bush and Coleman, 1995; Monsour, 1998)
- improved technical expertise / problem analysis (Grover, 1994; Bush and Coleman, 1995; Coleman et al, 1996)
- support in relinquishing any previous professional identity (Southworth, 1995)
- friendship (Monsour, 1998)

New heads/mentees who had been mentored are reported to have been appreciative of:

- mentors who provided practical advice and assisted them in solving problems (Bolam et al, 1993; Pocklington and Weindling, 1996; Bush and Coleman, 1995)
- mentors who served as a constant resource (Bolam et al, 1993; Bolam et al, 1995)
- mentors who brokered linkage with resources or people (Bolam et al, 1993; Grover, 1994; Monsour, 1998)
- mentors who acted as a sounding board and provided opportunities to share ideas and discuss concerns and uncertainties (Bolam et al, 1993; Bush and Coleman, 1995)
- mentors who provided emotional support and reassurance within an informal and friendly relationship (Bush and Coleman, 1995; Pocklington and Weindling, 1996; Monsour, 1998)
- mentors who possessed sensitivity and good communication skills (Grover, 1994)
- mentors who had administrative expertise (Grover, 1994)
- mentors who had a good knowledge of the school system (Grover, 1994)
- the opportunity to arrive at considered rather than precipitate action (Bush and Coleman, 1995)
- opportunities to let off steam (Bush and Coleman, 1995)
- opportunities to share resources and materials (Monsour, 1998)
- opportunities to undertake site visits (Monsour, 1998)

Whilst in Section 3 it was reported that, according to one study, new heads tended to favour informal support from more experienced heads (Bolam et al, 2000), there may be a case for having formal programmes in place, on the grounds that beginning administrators are often too overwhelmed in their new positions to seek help when they need it most (Monsour, 1998).

4.2 Benefits to mentors

Whilst most of the articles and papers which have been reviewed focus mainly on benefits of participating in mentoring for the new heads/mentees, some studies also referred to the benefits of such a process for the mentors themselves and for the wider educational system (Bolam et al, 1995; Bush and Coleman, 1995).

Gains which have been reported for mentors include:

- benefits to their own professional development (Pocklington and Weindling, 1996; Coleman et al, 1996)
- improved performance/problem analysis (Hopkins-Thompson, 2000; Bush and Coleman, 1995)
- insights into current practice (Bush and Coleman, 1995)
- awareness of different approaches to headship (Bush and Coleman, 1995)
- increased reflectiveness (Hopkins-Thompson, 2000)
- improved self-esteem (Hopkins-Thompson, 2000)

Participating mentors were also reported to be appreciative of mutual information sharing (Monsour, 1998) and the opportunity to discuss professional issues with an equal partner (Bush and Coleman, 1995).

4.3 Benefits to the educational system

Given the nature of their role, benefits experienced by individual headteachers (both mentees and mentors) will tend to have knock-on effects in terms of benefits for their schools and for the educational system as a whole. Schools are thus reported to benefit from more effective headteachers/improved school management, from more confident heads in general, and more assured leadership earlier in a head's career in particular (Bush and Coleman, 1995). Mentoring has also been reported to be a relatively cost-efficient form of professional support/development (Bush and Coleman, 1995).

5. Factors Influencing the Success of Mentoring Programmes for New Headteachers

The various research studies examined for this review suggest that there are a whole host of factors which can and do impact on the effectiveness of schemes for the mentoring of new headteachers. On the evidence of data collected from the key participants in the mentoring process, the four biggest factors are: (1) the availability of time in which to undertake mentoring, (2) the matching/pairing of mentors and mentees, (3) the qualities/attributes of mentors, and (4) mentor training.

5.1 The availability of time

Evaluating the Headteacher Mentoring Pilot programme in England and Wales, Bolam et al (1993) found that the principal difficulty identified by mentors and mentees who participated in the programme was finding sufficient time for mentoring. Time was also reported to have been a key constraint in a number of other mentoring schemes (Bush and Coleman, 1995; Monsour, 1998; Hopkins-Thompson, 2000). Various suggestions have been made, both by research participants and by researchers/authors reflecting on their data, with a view to minimising or attempting to overcome this constraint. For example, both mentors and mentees involved in the evaluation of the Headteacher Mentoring Pilot Scheme in England and Wales agreed that, because of the time required and the emotional demands imposed, mentors should be responsible for only one headteacher (Bolam et al, 1993). Monsour (1998) suggested that mentors should visit the protégé's school / workplace early in the process, and retain the initiative in making contact; and that both should be given a two-day block of time in which to establish their relationship. Grover (1994) also stated that there should be provision for regular and structured meetings, suggesting that these might occur on a monthly basis, at least during the early stages of the new headship.

Having noted that almost all respondents in the research that she was reporting had identified time as a major barrier to the mentoring process, Hopkins-Thompson (2000) recommends a range of strategies to overcome this obstacle. These include assigning one mentor to a group, who would then also support each other (as reported by Grover (1994), discussing the New York scheme); less frequent meetings supported by the use of reflection logs; and the increased use of technology (e-mail, secure chat rooms/discussion forums, and video conferencing). She also suggests that recently retired principals can make good mentors, a point which is also supported elsewhere (Grover, 1994; Blandford and Squire, 2000), but adds the caveat that they should always be kept up to date through the provision of training courses.

5.2 The matching of mentors and mentees

The match between mentor and new head was reported in several studies to be critical to the success of the mentoring process (Bush and Coleman, 1995; Bolam et al, 1993; Monsour, 1998; Blandford and Squire, 2000; Daresh and Male, 2000; Draper and McMichael, 2000; Hopkins-Thompson, 2000; Brady, 1993). Various suggestions have been made in relation to achieving a 'good match'. Whilst some mentors participating in headteacher and other forms of mentoring have been 'volunteers', and whilst the voluntary aspect might be considered important, Hopkins-Thompson (2000) suggested that it was also important that screening and selection of mentors took place, to examine their suitability for mentoring in general, and with a view to establishing a good 'pairing' between mentors and individual mentees. Bolam et al (1993) agreed that procedures to provide ongoing support for the effective selection and matching of participants should be built into any mentoring programme from the outset, while Newton (2001) writes that mentors should be selected from a national register based on clear criteria, and that nationally agreed working protocols should be established to guide mentoring activities.

Monsour (1998) suggests that mentors and protégés should be based near each other (geographically), and have similar interests and learning styles. The suggestion that mentor and mentee be based in similar localities was supported by Blandford and Squire (2000), citing the positive feedback of mentees whose mentor had been able to provide professional mentoring based on insights into local as well as national issues, and by Draper and McMichael (2000), who stressed that it is essential for new heads to feel confident about dealing with the multiplicity and context-specificity of demands made upon them in individual schools. However, both Draper and McMichael (2000) and Daresh and Male (2000) noted that, in some cases, local rivalries, such as those resulting from schools being in competition for students, provided an obstacle to the development of support systems and co-operative working between headteachers in the same localities.

Monsour (1998) and others have suggested, on the basis that (however well thought-out) the pairing of mentors and mentees may prove to be unsuccessful, that mentoring programmes must include provision for protégés to be paired with a different mentor.

5.3 The qualities and attributes of a successful mentor

Grover (1994) indicated that effective mentors were seen (notably by mentees) as knowledgeable, experienced, supportive, reliable, flexible, accessible and trustworthy. He suggested that the individuals selected as mentors should possess these qualities. Coleman et al (1996) reported that 76 per cent of respondents from their English sample identified the possession of listening skills, by mentors, as essential to the success of the mentoring process. Monsour (1998) reported that some regarded it as important that the mentor should be seen by their peers as an educational leader and role model, and should possess influence within the school and community.

Grover (1994) noted that the gender and ethnicity of mentors and principals involved in the New York mentoring programme appeared to have no impact on the mentoring experience, and Bolam et al (1993) state that whilst, on the Headteacher Mentoring Pilot scheme in England and Wales, female headteachers were less likely than males to have a mentor of the same gender, only a small minority of women saw gender differences as problematic. The latter authors nevertheless point to the need for all concerned to be sensitive to the possible implications of gender differences within the mentoring relationship (Bolam et al, 1993).

5.4 Mentor training

A number of authors, some citing the views of mentee participants in their research, referred to the importance of mentor training to the development of effective mentoring programmes, (Hopkins-Thompson, 2000; Bolam et al, 1993; Monsour, 1998). Monsour (1998) says that mentors should receive training in adult development and be fully prepared for the possible extent of the relationship. This stated need for mentor training is sharpened by Southworth's (1995) warning that advice from long experienced headteachers could lead to the reinforcement of traditional role expectations rather than the rethinking of approaches.

Reporting on the Headteacher Mentoring Pilot Scheme in England and Wales, Bolam et al (1993) noted that most new heads who had undertaken training both valued it and were more satisfied with the experience of mentoring than those who had not. In suggesting that mentors should receive preparatory training, the same authors recommended that part of this should include the participating new headteachers, a suggestion supported by Hopkins-Thompson, 2000). Monsour (1998) also stresses the importance of mentees being fully prepared for their involvement in the mentoring process, suggesting that they should receive a handbook detailing the activities they are likely to be involved in and the respective responsibilities of the mentor and mentee. The author recommended that both mentor and mentee should thus receive identical information on expectations for the process and programme (Monsour, 1998).

5.5 Other factors influencing the effectiveness of mentoring

In addition to the four factors discussed above, the potential success of mentoring programmes for new headteachers may be influenced by a range of additional factors.

- Bush and Coleman (1995) reported that, along with lack of time and a potential mismatch between mentor and mentee, the **risk of over-dependency on the mentor** was one of the major factors identified as most likely to undermine the mentoring process. It follows that both mentors and mentees might be given strategies to assist them to avoid such a situation from developing.
- Bolam et al (1993) noted that the **desire of some new heads for specific advice** rather than enabling support could lead to tensions within the mentoring process. The authors conclude that mentors need to be flexible: ready and willing to offer practical guidance to specific problems where this is requested but also to encourage their partner to make the actual decision.
- Both Blandford and Squire (2000) and Monsour (1998) stressed the importance of mentees undergoing a **needs analysis / needs assessment**, in order that mentoring could be tailored to their individual requirements.
- Some authors stated that it was important that mentoring provision and providers should be subject to **monitoring and evaluation** (Bolam et al, 1993; Blandford and Squire, 2000; Hopkins-Thompson, 2000).
- Evidence suggests that headteacher mentees tend to reject an 'expert-novice' mentoring relationship in favour of one of **'peer support'** (Bush and Coleman, 1995; Monsour, 1998).
- Aspects of mentoring identified as important by the participants included building a **relationship based on confidentiality and trust** (Bolam et al, 1993; Monsour, 1998).

- Some studies suggest that, in various ways, **mentoring programmes should be formalised**. Monsour (1998) suggested that the mentor and mentee should sign a one-year contract to commit to the process, and should subsequently agree a professional development plan for the mentee and work to a jointly agreed agenda. Bolam et al (1993) urged the adoption of some form of ongoing record of the mentoring process.
- Some evidence suggested that mentoring programmes should combine both individual and **group meetings** (Grover, 1994), where, for example, mentor-mentee pairs might meet with other pairs in small groups (Monsour, 1998), thereby exposing new heads to a broader range of insights and experience.
- Finally, research findings suggested that some new heads/mentees value **opportunities to visit other schools**, though some found meetings/visits planned during the school day inconvenient (Grover, 1994).

6. Conclusions and Discussion

The findings presented in this review of the literature identify a range of mentoring and coaching practices employed both in relation to the induction of newly appointed headteachers and in other educational and non-educational settings. The weight of the evidence also suggests that, where they are practised, such processes tend to be effective and to bring a range of benefits for both mentees and mentors/coaches.

Three major discussion points arising from the findings presented here relate to the place of coaching in the induction of new headteachers, the provision of 'practical advice', and the nature of the research evidence on mentoring and coaching.

6.1 The place of coaching in the induction of new heads

Firstly, it seems that some mentors and mentor training providers, have questioned the appropriateness of coaching as a means of inducting and training new headteachers (Bush et al 1996).

It is possible, however, that the views of the mentors reported here were strongly influenced by the training they had undertaken, and it is not clear, from the existing evidence base, to what extent these findings are representative of mentors, mentor trainers and mentoring schemes in other areas of the UK or beyond.

Perhaps one of the obstacles to coming to a clear understanding of this issue is the lack of a shared understanding of the meaning of the term 'coaching'. Coaching is often regarded as a 'narrower' term than mentoring, with the former focusing more on the skills and competencies associated with particular roles, and the latter including both task-related and 'psycho-social' aspects. We have also seen, however, that some writers and some 'executive coaches' tend to incorporate into their notion of coaching many of the things that are usually associated with the broader concept of mentoring, the same concept which is valued by the majority of the participants in mentoring programmes.

Whilst at least some mentors and mentor trainers have questioned the relevance or usefulness of coaching to the induction and training of new headteachers, and whilst the evidence suggests that many new heads favour relationships characterised by the notion of 'peer mentoring' or support (Bush and Coleman, 1995; Monsour, 1998), we have also seen that many new headteachers are reported to value 'practical advice' and the support of mentors who are prepared to offer 'solutions' to their problems.

6.2 The provision of practical advice and 'solutions'

Whilst some mentor training courses have explicitly discouraged mentors from offering solutions to the new heads' problems, Bolam et al (1993, 1995) suggest that mentors should nevertheless be ready to respond to requests for specific advice about practical problems. Pocklington and Weindling (1996) go further and argue that the provision of practical advice is a necessary, early stage in the mentoring of new heads, many of whom have been shown to seek specific practical advice on issues of immediate concern. This reflects Kram's (1983) point that the mentoring relationship is a dynamic one, and that mentoring should progress through a number of stages in parallel with the personal development and increasing competency of the mentee. It should also be remembered that different headteachers move through different stages of development at different speeds (Pocklington and Weindling (1996).

6.3 The nature of the research data: gaps in the evidence base

It is important to stress that the evidence for the effectiveness of mentoring and coaching, and evidence which points to the benefits of such approaches, is based predominantly on the perceptions of participants who have been involved in mentoring and coaching relationships, notably the mentors and mentees themselves. The perceptions of the key participants must undoubtedly be central to any evaluation, yet these are not necessarily sufficient. It might be argued, for example, that in some cases, mentors will be reluctant to state that their work has not been successful, whilst some new headteachers may be unwilling to speak out where they feel that more experienced and respected colleagues have not been as helpful as they might have been.

Furthermore, on the evidence of this review of the literature, there is a particular dearth of research evidence on the subsequent impact of mentoring or coaching on the performance of heads. Southworth (1995) has also drawn attention to the reliance on self-reported data and bemoaned the lack of observation of mentoring in action and of third party analyses of partnerships at work.

Perhaps inevitably, this report concludes with the oft-made remark that 'further research is needed'. West and Milan (2001) suggest some potentially powerful means by which the existing gaps in the evidence base might be partially closed. Such a significant study of coaching (or of mentoring) would, they argue:

'have to include at least the following elements in its protocol: a significant sample of coaching programmes/clients; a sufficiently wide assessment population (that is, additional stakeholders around each client studies whose opinions might be solicited to reduce the subjectivity of a narrow sample of direct participants...); [and] a control group against which to compare the 'coached sample'.

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