asset skills

Coaching and Mentoring

Research Report

September 2012

Co-Investment from
UKCES
UK COMMISSION FOR EMPLOYMENT AND SKILLS
Employer Investment Fund

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Asset Skills represents six industries in the UK: property and planning, housing, facilities management, cleaning and parking. Businesses in the sector share the goal of ensuring the environment in which we work, live and spend leisure time is developed, managed and maintained to the benefit of all.

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- Stimulate leadership from the bottom up to significantly raise employer ambition;
- Drive innovation, change employer behaviours and develop new ways of working; and
- Secure momentum from employers to support sustainable increases in skills levels and better use of skills across sectors.

The funding is supporting 61 projects over the period 2012 – 2014. This research report is part of the Asset Skills EIF 2 Talent Management programme of projects.

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Foreword

Employers across the UK are recognising the value of coaching and mentoring schemes for developing talent and producing high performance employees by using one-to-one discussions to enhance individuals' skills, knowledge and experience.

In the current economic climate characterised by high unemployment and limited job security, coaching and mentoring also offers employers a cost effective method of motivating and empowering staff to make decisions that meet customer expectations and achieve organisational objectives.

We hope you find this report useful and informative. As we strive to be as accurate as possible and to cover the areas of most concern to employers, please feedback to us any comments you may have. Armed with this information we can work with employers and partners to help them develop strategies to meet their requirements and develop world class skills.

September 2012

Sarah Bentley, Chief Executive, Asset Skills

Acknowledgements

Asset Skills would like to thank the following people for participating in our research on coaching and mentoring:

- Lisa Matthews (Learning and Organisational Development Advisor, Metropolitan)
- Catherine Proctor (Head of Organisational Development, Together Housing Group)
- Jane Blackburn (Director of Organisational Transformation, New Charter Housing Group)
- Juliet Hancock (Organisation Development and Change Consultant, Tenant Services Authority)

1. Executive Summary

In recent years, there has been a trend towards the use of targeted coaching and mentoring schemes as part of organisations wider talent management strategy first to develop high performance employees and second to respond to an economic climate that has forced many organisations to re-structure in an attempt to lower operational costs.

To identify the characteristics of different coaching and mentoring schemes to establish in what ways such schemes are suitable for employers working in the six Asset Skills sectors, a literature review was completed and a series of primary research case studies carried out.

The literature review illustrated how coaching and mentoring programmes are activities that can be considered part of the spectrum of 'talent management' because they either focus on developing specific new skills that benefit the individual and the company (coaching) or they help individuals develop new ways of thinking to overcome obstacles and progress in their career through a relationship with a more experienced individual (mentoring) (Serrat, 2009; CIPD, 2012).

The four employers that participated in the case study research recommended that employers implementing a successful coaching and mentoring schemes should:

- Have trained coaches or mentors with the experience to provide practical advice to solve dilemmas;
- Ensure your organisation is committed to the long-term development of a coaching and mentoring scheme;
- Provide networking opportunities for participants in coaching and mentoring schemes so they can share experiences and practice newly acquired skills;
- Provide support and supervision so mentors/coaches can continue to seek advice for their own personal development; and
- Develop an effective matching process to ensure the coaching/mentoring relationship is successful.

2. Introduction

Asset Skills is one of 21 Sector Skills Councils (SSCs) representing six sectors in the UK: property and planning, housing, facilities management, cleaning and parking. Businesses in these industries share the goal of ensuring the environment in which we work, live and spend leisure time is developed, managed and maintained to the benefit of all.

To achieve this goal, employers within the Asset Skills sectors must ensure that their employees have the necessary knowledge, skills and experience required to undertake their duties competently. One method of supporting employee development is through adopting coaching and mentoring activities which "*are an approach to management and a set of skills to nurture staff and deliver results*" (Serrat, 2009).

Coaching and mentoring programmes are activities that can be considered part of the spectrum of 'talent management' because they either focus on developing specific new skills that benefit the individual and the company (coaching) or they help individuals develop new ways of thinking that enable individuals to overcome obstacles and in some cases progress their career through a relationship with a more experienced individual (mentoring) (Serrat, 2009; CIPD, 2012).

To identify the key characteristics of a successful coaching and mentoring schemes, the Asset Skills Insight Team carried out a series of semi-structured case study interviews with five employers between August 2012 and September 2012. This report is the outcome of this research and begins with a literature review that explores the links between coaching, mentoring and the development of high performance employees.

The research methodology chapter presents the aims and objectives of the primary research, explains the materials and methods that were used to recruit participant and outlines the case study questionnaire design process to collect the data. This is followed by an examination of the results from the case studies, followed by recommendations for employers, individuals and others interested in this subject. The case study questionnaire is included as an appendix followed by the bibliography.

The information presented will be of interest to individuals, providers, employers and other who wish to implement coaching and mentoring schemes in the future. Further research work that develops this theme will be undertaken through the 'Asset Skills EIF2 Increasing Investment in Talent Management' programme during the period October 2012 to March 2013 (funded by UKCES).

3. Literature Review

3.1 Introduction

Organisations use a variety of methods to develop talent and produce high performing employees. Over the last 20 years, professional coaching and mentoring schemes have become popular methods of supporting learning and career development amongst new recruits, graduates and potential business managers (University of Wolverhampton, 2010).

Coaching and mentoring programmes are activities that can be considered part of the spectrum of 'talent management' because they either focus on developing specific new skills that benefit the individual and the company (coaching) or they help individuals develop new ways of thinking to overcome obstacles and enable them to progress in their career through a relationship with a more experienced individual (mentoring) (Serrat, 2009; CIPD, 2012).

Coaching and mentoring are similar, flexible methods of development that are based on the use of one-to-one discussion that aims to enhance an individual's skills, knowledge or work performance. They are both characterised by a willingness to listen, openness to new ideas, enthusiasm and encouraging individuals to become involved in new work experiences (CIMA, 2008).

Coaching and mentoring schemes can be delivered at relatively low cost making them particularly appropriate talent management tools for businesses in the current economic climate (CIPD, 2012). However, Peel (2004) argues that a lack of understanding about what coaching and mentoring means in an organisational context can create problems and effect the deployment of any type of development activity.

This literature review focuses on the links between coaching, mentoring and the development of high performance employees. It discusses a number of key issues including the differences between coaching and mentoring, and how these methods of talent management can benefit individuals and their employers.

3.2 Coaching and Mentoring

Historically, organisations have relied on formal training courses to fill gaps in staff skills, experience and knowledge but this "wholesale transfer" is not thought to stretch individual employees to their full potential (Serrat, 2009). In contrast, good coaching and mentoring schemes are "*deemed a highly effective way to help people, through talking, increase self-direction, self-esteem, efficacy and accomplishments*" (Serrat, 2009).

These schemes are often used as part of a wider talent management strategy that involves "*initiatives and strategies… to harness the unique talents of individual employees and convert their talent potential into optimum organisation performance*" (CIPD, 2010).

Such initiatives are important as the Coalition Government is continuing to promote the development of a highly skilled working population through policies that address skills needs in key sector. The aim is that the UK will be able to compete effectively in higher value markets where there is greater competition as a result of the current economic climate (UKCES, 2010[a]). Highly skilled workers are more productive, flexible and adaptable to change and can help ensure that businesses willing to invest in training are more competitive and significantly less likely to close than those that do not (Tamkin, 2005; UKCES, 2010[b]).

Whilst the aims, practicalities and outcomes of coaching and mentoring generally coincide, it is important to draw distinctions between the two concepts. Coaching is a short-term process that targets developing specific skills. It can be intensive and take place over a short period of time - for example, in order to learn a new skill, or it can be a longer relationship designed to develop a particular behaviour or attitude within an individual. Unlike mentoring, the coaching process relies on direct feedback, instruction and monitoring from the coach, i.e. what he or she has observed, and will often take place on a one-to-one basis (CIMA, 2008; CIPD, 2012).

According to research by the CIPD (2012), coaching by line managers is seen as one of the most cost-effective approaches used within in-house development programmes because it is an informal process that can be delivered at relatively low cost. Individuals are typically nominated for the coaching process by their line managers during performance reviews and one-to-ones. A coach will then help the individual to:

1. Assess their current situation
2. Target areas to strengthen or improve
3. Create an effective action plan
4. Implement changes to reach goals

In contrast, mentoring is typically a long-term relationship where a more experienced person (who could be a colleague in the same company, but not generally a line manager) uses their knowledge and experience to support the development of a more junior member of staff (CIMA, 2008). Some schemes are held internally with colleagues, while other schemes rely on external companies or mentors. To maximise the benefit of mentoring, the mentee will often be following a similar career path to the individual they are being mentored by.

According to Serrat (2009) structured mentoring schemes usually involve the following basic activities:

1. Individuals volunteering to be mentors or requesting to be a mentee
2. Training for both mentors and mentees
3. A series of confidential informal meetings between mentor and mentee that:
   - Analyse the present situation
   - Agree on performance goals
   - Explore available options
   - Implement agreed actions
   - Review experience and specify next steps
4. A structured 'end' of the mentor / mentee relationship

An effective mentoring relationship is an informal learning opportunity for both the mentee and the mentor. Unlike conventional training, mentoring focuses on achieving goals set by the individual by facilitating change through questions or by sharing experiences to promote greater self-awareness helping the learner to develop the ability to apply their skills, knowledge and experience to new situations (Serrat, 2009; CIPD, 2012).

For example, the Housing Diversity Network's 'Glass Forward' mentoring programme aimed to help female employees, already in senior management positions breakdown any self-imposed barriers preventing them from advancing up the career ladder. The programme paired fifteen female members of staff employed in senior management positions with chief executives from other organisations to build their confidence, strategic abilities, influencing skills and management skills (Sofekun, 2011).

Mentoring and coaching can be standalone activities or they can be used to complement each other to tackle issues like developing careers, solving problems, overcoming conflicts and re-motivating staff. An example of this is the 'Rising Stars' Project held in the North West of England which aimed to support 18 candidates from different housing associations who were not at a senior level through six coaching and mentoring sessions.

These sessions were designed to encourage candidates to think differently about their organisation, how to develop their personal skills and the leadership skills they might need in the future to become leaders within the sector (Asset Skills, 2012). The coaching element of the programme focused on developing specific skills and attitudes amongst candidates, while the mentoring element facilitated this change by encouraging individual reflection.

It is useful to note that there is overlap between coaching and mentoring, some argue that while mentoring is a role that includes coaching appropriate to the situation and relationship (Serrat, 2009), coaches do not mentor because they are hired to tackle specific performance issues, or to help an individual develop specific skills over a short period of time.

3.3 The Benefits

From an employer perspective, talent management methods such as coaching and mentoring can make a significant contribution to the development of high performance employees.

This can benefit the employer because mentoring an individual starting a new role ensures they settle more quickly, making them more productive (Peel, 2004). The fact that their employer has arranged mentoring support can inspire loyalty and increase commitment from the new member of staff, which can lower recruitment costs as employees are willing to remain with the company longer (University of Wolverhampton, 2010). Mentoring can also have wider benefits for the individual by providing them with support through challenging situations, helping them develop an in-depth understanding of the organisations structure, providing them with a wider perspective (if the mentor or coach is from another organisation), accessing careers advice and gaining insight into management processes.

Coaching can also benefit individuals by providing them with another perspective on personal challenges, enhancing thinking and decision making skills, improving interpersonal skills and increasing confidence (ICF, 2011).

Both coaching and mentoring can contribute to improved staff motivation by providing an opportunity to identify training needs and helping employees to make the most of the learning that they undertake at the same time – for example, providing additional support to talk through problems or provide advice while individuals study towards a qualification. Mentoring and coaching can contribute to company succession planning. Employees build on their strengths and work on their development needs so they can prepare for moving into new roles in the organisation – this process is often seen in 'fast-track' or management development schemes (University of Wolverhampton, 2010).

From an employee perspective, coaching and mentoring offers the opportunity develop soft skills such as communication, networking and confidence, as well as improving technical skills required in their job (University of Wolverhampton, 2010). Serrat (2009) argues that *"good coaching and mentoring schemes are deemed a highly effective way to help people, through talking, increase self-direction, self-esteem, efficacy and accomplishments"*.

3.4 Implementing Coaching and Mentoring Schemes

Evidence suggests that the successful implementation of mentoring and coaching programmes is characterised by five key features, namely:

- All coaching and mentoring is linked to the wider business strategy;
- Mentors and coaches receive training before the programme starts, ensuring they have the skills;
- Mentors and coaches are matched with individuals to avoid personality clashes;
- There is additional workload support and flexibility during the process; and
- There are evaluation and feedback measures to ensure the programme is effective.

Peel (2004) argues that a lack of understanding about what coaching and mentoring means in an organisational context can create problems and effect the deployment of any type of development activity. Therefore in a wider organisational context, the success of a mentoring and coaching programme requires team support, such as volunteers and job cover when people are in coaching or mentoring sessions. To achieve this,

Employers should provide all staff with information on the benefits of coaching and mentoring highlighting what it can and cannot achieve. This information should also include details on who can be involved in mentoring and coaching, as well as how it can be used.

Research by ACCA (2009) revealed that because few organisations are seeking to embed a coaching and mentoring culture across their business they are having poor returns on investment in training. It surveyed 700 members and found that 85 per cent of respondents believed it would be beneficial to use coaches but over 60 per cent of organisations do not use accredited internal or external coaches to develop the competencies of finance professionals.

Additionally, 85 per cent of respondents deemed it beneficial to implement a coaching culture but lack of buy-in from senior management remains a challenge for the establishment of coaching practices in many organisations.

3.5 Conclusions

Historically, organisations have relied on formal training courses to fill gaps in staff skills, experience and knowledge but this "wholesale transfer" is not thought to stretch individual employees to their full potential (Serrat, 2009).

In recent years, there has been a trend amongst employers for adopting coaching and mentoring as a cost effective method of incorporating talent management into their organisations business strategy to create high performance employees that can reach their full potential.

Whilst both coaching and mentoring are flexible methods based on the use of discussion to enhance an individual's skills, knowledge and work performance, it is possible to draw distinctions between the two concepts.

Mentoring is typically a long-term relationship where a more experienced colleague uses their knowledge and experience to support the development of a more junior member of staff, while coaching is a short-term process that targets specific skills to ensure the learner can do a better job. Both offer employers the opportunity to enhance an individual's skills, knowledge and work performance.

Evidence suggests that coaching and mentoring can benefit employers by reducing recruitment costs through an increase in staff motivation, loyalty and commitment. However, there are still concerns that a lack of understanding about how best to use coaching and mentoring can make implementation less cost effective.

To overcome these issues, employers must ensure that their coaching and mentoring schemes receive the support of their workforce, by providing staff at all levels of the organisation with information on who can be involved, how it can be used and what the benefits are.

4. Research Methods

4.1 Aims and Objectives

1. To gain an understanding of different coaching and mentoring schemes in order to evaluate how useful they would be to employers within our sectors.
2. To build a profile of different coaching and mentoring used by selected employers.
3. To establish the strengths and limitations of coaching and mentoring schemes.
4. To evaluate how useful these coaching and mentoring schemes would be to employers in the Asset Skills sectors.

4.2 Research Methods

Employers that registered interest in participating in the coaching and mentoring case study research were then contacted via email and asked if they would be willing to do a semi-structured telephone interview which was anticipated to last a minimum of 15 minutes to discuss their organisations coaching and mentoring scheme. This method was used because telephone interviews could be held at the employer's convenience and in-depth qualitative data could still be collected.

All of the interviews were recorded and the transcripts were used to write in-depth case studies demonstrating the practical applications of coaching and mentoring in their organisations and how this has benefitted their business and workforce. The case study was then returned to the participant for approval, before being published in this report.

4.3 Case Study Questionnaire Design Process

5 employers participated in the coaching and mentoring research and a discussion guide covering the following key areas:

- The organisation background
- A description of the organisation's coaching and mentoring scheme
- An explanation of how this scheme relates to the organisations business objectives
- A summary of the benefits for individuals
- A summary of the benefits for the organisation
- A description of how organisations plan to change the scheme in the future
- Employers were asked what advice they would give to other employers planning to introduce a coaching and mentoring scheme.

5. Coaching and Mentoring Case Studies

This chapter discusses the general trends and key features associated with the coaching and mentoring schemes profiled during this case study research. These case studies were selected because they demonstrate coaching and mentoring scheme best practice.

5.1 Motivations

Chapter 3 indicated that over the last 20 years, professional coaching and mentoring schemes have become popular methods of supporting learning and development to maximise the potential of staff and achieve business objectives (University of Wolverhampton, 2010). The employers that participated in the case study research cited similar reasons for introducing coaching and mentoring schemes within their organisations.

For example, one employer stated "*we used coaching and mentoring as blended learning solutions designed to empower people to take ownership for their personal development rather than just telling them to attend one-size-fits-all training courses*" (J. Hancock, Housing Employer).

Another employer said "*developing talent through coaching is very much part of the culture within the organisation. Teaching our managers how to coach they can support their teams to make decisions and to be accountable for their actions ensures that we can reach our wider business objectives*" (L. Matthews, Metropolitan).

5.2 Characteristics

Table 1 indicates that employers identified seven key characteristics of successful coaching and mentoring schemes, particularly trained coaches, opportunities to network and organisational commitment to the process.

Table 1: Key Characteristics of Coaching and Mentoring Schemes

Key Characteristics
Trained coaching
Opportunities to network
Organisational commitment
Voluntary participation by staff
Clear objectives
Support and supervision
Clear business case able to demonstrate benefits

(Source: Asset Skills, 2012)

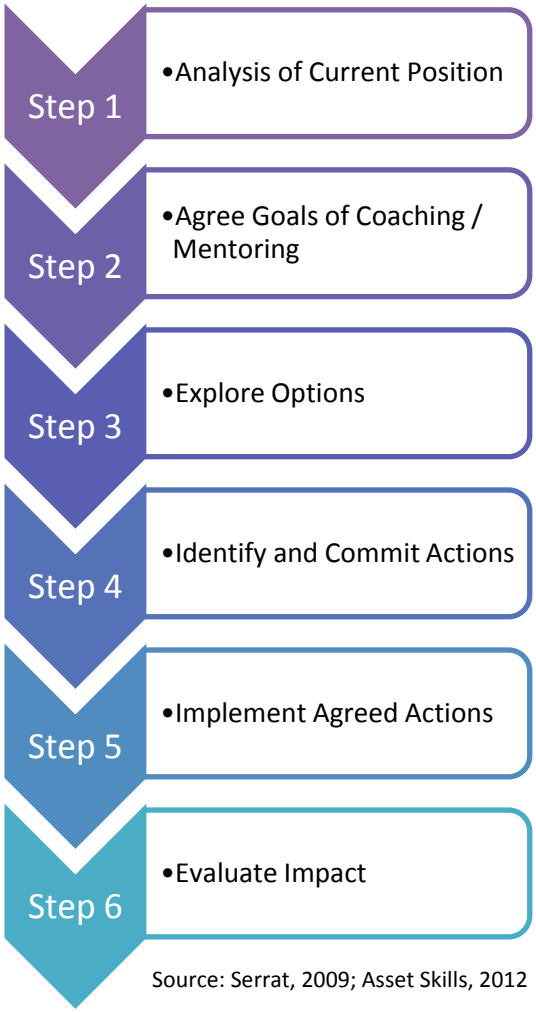
5.3 Structure

It is evident from the case studies that employers believe a structured approach to coaching and mentoring schemes (shown in Figure 1) will ensure they have clear objectives and actionable solutions that are likely to have the most significant positive impact on staff skills, knowledge and experience to maximise their potential.

One employer stated "*it is essential to have a clear process if you are going to introduce a mentoring scheme. You need to be very clear about roles and responsibilities, the selection process, the training, how the scheme will be administered and how it will be evaluated*" (J. Hancock, Housing Employer).

Employers reported ensuring that those responsible for implementing coaching and mentoring practices, such as senior managers, had received the training and qualifications to implement a structured coaching and mentoring scheme.

Figure 1: Structured Coaching and Mentoring



Source: Serrat, 2009; Asset Skills, 2012

This is important so managers can make the most of performance reviews or one-to-one meetings with individuals in their teams by giving them the opportunity to reflect on their personal development, explore options and identify the skills to overcome any obstacles they are facing in their careers.

5.4 Case Study 1: Metropolitan

Coaching is becoming an increasingly popular feature of talent management strategies across the UK as it offers an opportunity to motivate, engage and develop staff. Metropolitan have developed a coaching culture within their organisation designed to help managers develop talent amongst their staff.

Overview

Metropolitan is a leading provider of integrated housing services, community regeneration, care and support. They manage over 36,000 affordable homes across London, the East of England and the East Midlands.

To ensure their 2,300 staff have the skills, knowledge and experience to do their jobs effectively and meet company objectives, Metropolitan have developed an in-depth coaching programme focusing on managers as part of their wider talent management strategy.

> "Developing talent through coaching is very much part of the culture within the organisation. By training and supporting our managers to coach they can support their teams to make decisions and to be accountable so that we can reach our wider business objectives."
>
> (L. Matthews, Metropolitan)

The coaching framework is designed to help managers develop the coaching skills they need to support the activity of their staff and facilitate staff development within the organisation – for example, by using coaching skills during performance reviews to get the most out of the opportunity.

Talent Management through Coaching

At Metropolitan, all managers are expected to attend a one day induction to the principles of coaching. It covers a range of topics including:

- What coaching is
- The most appropriate time to use coaching
- Active listening
- Powerful questioning
- Coaching ethics
- Coaching demonstrations

This programme is designed to give individuals a broad overview of coaching and after attending the session they are eligible to attend regional coaching networks on a quarterly basis to practice their newly acquired skills and learn from other peoples experiences.

Whilst Metropolitan does not expect managers to conduct formal coaching sessions after the induction, it does expect them to begin to implement a coaching approach.

> "This approach has definitely got to be driven by the business to embed a coaching approach to develop talent across teams. I think it is also important to evaluate the impact it has so that you can continue to justify its value to your business."
>
> (L. Matthews, Metropolitan)

If employees are keen to continue developing their coaching skills, they can attend a two day course that covers coaching in more detail in areas like formal coaching relationships, contracting and coaching agreements.

From the two day course, managers have the option of completing a Level 5 Institute of Leadership and Management certificate in coaching and mentoring which involves a further day of preparation for their assignment, a coaching diary and a certain number of coaching practice hours.

For those that have completed this training and achieved a qualification, Metropolitan hold regular coaching and leadership refresher events for senior managers within the organisation to maintain their skills level.

The Value of Coaching

Metropolitan believe that if a manager uses a coaching approach with the right people it can be really powerful in their development by increasing their confidence and empowering them to make decisions. For many staff, simply having someone to take the time to listen, build their confidence and help them overcome obstacles by developing knowledge and skills can really support them in their job role.

Due to the success of the programme, Metropolitan is planning a one day induction workshop for non-managers that they feel might benefit from developing coaching skills – for example, someone who manages a team of volunteers.

Key Characteristics of a Quality Coaching Scheme

Metropolitan stated that the three key characteristics of a successful coaching scheme are:

1. Having different routes available so people with a variety of aspirations can participate
2. Provide network meetings to enable coaches to practice their skills and share experiences
3. Be prepared to re-iterate what the scheme is about and the benefits of coaching

Benefits of Adopting this Type of Coaching Scheme

Metropolitan believe that the main benefits of this type of scheme are:

- It gives people an opportunity to learn and grow during a time when there are very few opportunities for promotion because fewer people are changing jobs due to fears that any job they move into will be less secure.
- A coaching culture within the organisation ensures that managers can facilitate the development of skills, knowledge and experience within their team.
- A coaching approach with the right people it can be really powerful in their development by increasing their confidence and empowering them to make decisions.

Further Information

This case study was undertaken between August 2012 and September 2012. Further information about the programme can be found at http://www.assetskills.org/Projects/TalentManagement.aspx. If you would like to speak to someone about this approach please contact Helen Kemp (Insight Officer, Asset Skills, email: hkemp@assetskills.org).

5.5 Case Study 2: Together Housing Group

Together Housing Group has developed a three strand approach to coaching within their organisation designed to support staff to learn, grow and maximise their potential. This is expected to improve organisational performance by empowering individuals to make decisions that meet customer expectations.

Overview

Together Housing Group was formed in April 2011 to collectively manage 35,000 homes to support 50,000 people in the North of England.

To ensure their 1,250 staff have the skills, knowledge and experience to do their jobs effectively and meet company objectives, Together Housing Group have developed a three strand approach to deliver coaching to staff so they can learn, grow and maximise their potential.

> "Coaching plays an important role in the development of a culture where our employees can learn, grow and maximise their potential. It is an ideal way of encouraging staff to think independently, empowering them to make decisions that deliver customer expectations."
>
> (C. Proctor, Together Housing Group

This approach to coaching has been linked to Together Housing Group's wider business objectives because it is a relatively new approach for many of their managers and the organisations wants to encourage them to use coaching as a new people management tool.

Talent Management through Coaching

The first strand of the coaching scheme involves training senior managers to ILM Level 5 so that they can actively engage in coaching with more junior managers undertaking the organisation's management development programme or managers that have nominated themselves to receive additional support and advice for their career development.

The second strand of the coaching scheme focuses on training all front-line managers to ILM Level 3 so that they can deliver further coaching to their team members and enrich the personal development planning process to facilitate more effective front-line decision making.

This is important because front-line employees working in the housing sector often face difficult decisions and need to be focused on delivering a service that meets customer expectations. Together Housing believes that coaching is an ideal way to build on strengths and enhance development opportunities across the workforce.

> "Individuals that have been coached felt that the process was really valuable because it gave them the time and space to explore issues intelligently with somebody who is not going to say 'here's the solution, now go away and do it', but will challenge them to think it through and come up with their own solution."
>
> (C. Proctor, Together Housing Group)

The third strand of the coaching scheme is an individual approach where people are linked with external coaches from commercial backgrounds to improve their strengths and expand their experiences. This encourages staff to develop new ideas, new ways of thinking and to get advice on issues they are currently facing.

For example, if a director within the organisation was facing a significant change management project, they could work with a coach from a change management background so that they could draw on the coach's experience to help develop their approach and confidence in implementing an effective approach.

Feedback on the three strand approach shows that employees feel the coaching scheme gives them the time and space to explore issues and develop skills with someone who will challenge them to think it through and support them to come up with their own solution.

The Value of Coaching

Together Housing Group is developing a coaching culture to help employees learn, grow and maximise their potential.

> "My advice to other employers thinking about implementing a coaching scheme is to be very realistic about the time it takes to learn new techniques. It is important you have a realistic timeline on how long it takes to embed coaching skills."
>
> (C. Proctor, Together Housing Group)

They believe that this will improve the personal development planning process by ensuring that managers have the tools to start a conversation with their team members that will focus on their strengths, capabilities and potential improvements

This will improve organisational performance by ensuring that employees have the skills, knowledge and experience to meet customer expectations through improved decision making.

Key Characteristics of a Quality Coaching Scheme

Together Housing Group stated that the three key characteristics of a successful coaching scheme are:

1. Having expert tutors who have coaching experience to provide practical approaches to dilemmas that they find themselves in one key area.
2. The organisation must be willing to try out new activities.
3. The organisation must be committed to seeing it through (a long process).

Benefits of Adopting this Type of Coaching Scheme

Together Housing Group believes that the main benefits of this type of scheme are:

- Coaching skills ensure managers can deliver further coaching to their team members and enrich the personal development planning process to facilitate more effective front-line decision making.
- Coaching gives managers the time and space to explore issues and develop skills with someone who will challenge them and support them to come up with their own solutions.
- A coaching approach can improve organisational performance by ensuring that employees have the skills, knowledge and experience to meet customer expectations through improved decision making.

Further Information

This case study was undertaken between August 2012 and September 2012. Further information about the programme can be found at http://www.assetskills.org/Projects/TalentManagement.aspx. If you would like to speak to someone about this approach please contact Helen Kemp (Insight Officer, Asset Skills, email: hkemp@assetskills.org).

5.6 Case Study 3: New Charter Housing Trust Group

Coaching is a major personal development initiative at New Charter that requires managers to have the coaching skills required to support their teams through one-to-one meetings or performance reviews and provide 'in the moment' coaching. The coaching sessions focus on developing skills, attributes or behaviours the individual requires to perform their job to a higher standard.

Overview

New Charter Housing Trust Group is a registered social housing provider owning over 18,500 homes. To ensure that their 850 employees have the skills, knowledge and experience to do their jobs, New Charter introduced a coaching strategy.

This scheme enabled over 75 managers within the organisation to train as coaches so they could provide quality coaching to individuals within their teams through one-to-one meetings or performance reviews. Additionally, a manager could be asked to coach members of staff across the organisation.

> "Coaching is one of the major personal development initiatives benefitting New Charter at the moment. It is supporting employees learning and helping people through a period of change by giving them space to reflect on their work, progress and achieve targets."
>
> (J. Blackburn, New Charter)

New Charter believes that it is important that coaches are fully trained with evidence of their competence through qualifications. This ensures that the coaching model is applied to the same standard across the organisation and coaches have an excellent understanding of the ethical aspects of a coaching relationship.

Talent Management through Coaching

New Charter has a coaching strategy in place that allows individuals to request coaching if they feel that they would benefit from it.

The individual is then required to identify two or three people from a list of coaches who they would feel comfortable working with. The selected coaches are then contacted and the one with the best availability will be responsible for coaching that individual.

The coaching model used to improve performance at New Charter is GROW, this stands for:

- Goal
- (Current) Reality
- Options
- Will

In the first meeting between the coach and individual objectives are set establishing a **goal** for the coaching process.

> "My advice to any employer considering implementing a coaching scheme is to have a good think about strategy and making sure it is resources properly. I think it is very important to make sure you have fully trained coaches that are supervised regularly."
>
> (J. Blackburn, New Charter)

The coaching can focus on a range of topics including confidence, self-esteem, management skills, presentation skills, career development and employability. However, it is important that the coach and individual discuss the current **reality** to gain a comprehensive understanding that will provide the basis for the coaching sessions.

These sessions tend to be between one and two hours in duration and give individuals structured ways to reflect on their personal development, explore options and identify the skills to overcome these obstacles. Once the **options** have been explored individuals need to agree actions with their coach that they will be committed too (**will**) so they can overcome the obstacle.

However, the organisation also encourages the use of 'in the moment' coaching. For example, if a coach sees someone struggling they might use open questions to help them think through an issue and come up with a solution.

The Value of Coaching

Coaching is providing New Charter with a method of developing managers that ensures they have the tools to provide feedback and support to their teams so they can improve their performance and achieve business objectives. New Charter plan to continue their coaching programme in the future by training more managers as coaches and providing supervision for coaches so they can continue to develop their coaching practice.

Key Characteristics of a Quality Coaching Scheme

New Charter Trust Housing Group stated that the three key characteristics of a successful coaching scheme are:

1. Effective contracting and review process to ensure coaching arrangement is productive.
2. Trained coaches with an acceptable level of competence.
3. Supervision to ensure that coaches can continue their own personal development.

Benefits of Adopting this Type of Coaching Scheme

New Charter Trust Housing Group believes that the main benefits of this type of scheme are:

- Coaching is structured using a coaching model to ensure that individuals get the most out of the experience by developing actions to overcome obstacles.
- Coaching focuses on issues identified by the individual to either build on strengths or mitigate weaknesses.
- A coaching approach can improve organisational performance by ensuring that employees have the skills, knowledge and experience.

Further Information

This case study was undertaken between August 2012 and September 2012. Further information about the programme can be found at http://www.assetskills.org/Projects/TalentManagement.aspx. If you would like to speak to someone about this approach please contact Helen Kemp (Insight Officer, Asset Skills, email: hkemp@assetskills.org).

5.7 Case Study 4: Developing Talent in a Social Housing Regulator (Retrospective Case Study)

Mentoring is becoming an increasingly popular feature of talent management strategies across the UK as it offers a cost effective method to motivate, engage and develop staff. If it is implemented successfully, a mentoring programme can help an organisation achieve its goals and support staff through a period of significant change, retaining and developing the skills required for the future, whether targeted at certain roles or for all staff.

Overview

The Tenant Services Authority (TSA) was the independent regulator for affordable housing in England until 2012, taking regulation over from the Housing Corporation, its predecessor body.

As part of their wider talent management approach, the Housing Corporation introduced a voluntary mentoring scheme in 2005 that offered employees within the organisation the opportunity to request a mentor to support their career development. This scheme was so successful it was continued by the TSA.

> "For both the Housing Corporation, and the Tenant Services Authority, talent was defined as everybody working in the organisation. All our employees were offered the same mentoring opportunities to develop their knowledge, skills and experience as part of our learning and organisation development strategy."
>
> (Juliet Hancock)

This scheme was introduced as a blended learning solution to help individual staff take ownership for their own personal development rather than just attending "one-size-fits-all" training courses. It became an important element of the learning and organisation development strategies for both organisations, supporting the development of a diverse workforce, and was an essential vehicle to help staff make the most of structural and role based organisation change.

Talent Management through Mentoring

When the mentoring scheme was launched in 2005, the majority of mentors were managers; however, in 2006 this was opened up so that anyone could be a mentor and anyone could be a mentee.

There was up to 100 people participating in the scheme at any time (20 per cent of the workforce) with training opportunities offered to mentors and mentees as well as an annual conference to facilitate networking amongst the staff, enable further skills development and to share and celebrate successful learning.

The objectives for the mentoring sessions were specific to the individual mentee and could focus on a range of topics. This included career development (such as planning a career move), support (for example, if someone has entered a management role), gaining specific knowledge and skills, developing confidence, building networks, or to enhance performance.

However, the mentees were not the only ones to benefit from the mentoring scheme. Mentors, including technical specialists, were able to use the opportunity to apply their coaching skills to develop others as well as themselves.

> "Empowering others and developing capacity in housing was an important part of our purpose. The mentoring programme allowed us to develop, motivate and engage people inside and beyond the organisation. 94 per cent of people that attended our mentoring conference agreed that the skills they had gained through mentoring had enhanced their performance in their job and development."
>
> (Juliet Hancock)

The Value of Mentoring

Overall, the use of a mentoring scheme within the TSA and Housing Corporation ensured that staff had the support to develop their knowledge, skills and experience during a period of significant change.

The scheme was found to be cost effective and good value for money because everyone that got involved volunteered, including internal and external mentors, and it was driven by both the needs of the organisation and the motivation of staff.

By linking this mentoring scheme to the wider business objectives and performance management framework everybody within the organisation understood the purpose and was willing to participate.

At the end of the day, the success of any mentoring scheme depends on the individuals taking part, their managers, and, most importantly the support from senior management.

Key Characteristics of a Quality Mentoring Scheme

The Tenant Services Authority stated that the three key characteristics of a successful mentoring scheme are:

1. Delivers clear objectives and benefits for the individual and organisation
2. Well planned and executed
3. Owned by participants

Benefits of Adopting this Type of Mentoring Scheme

The Tenant Services Authority believes that the main benefits of this type of scheme are:

- Mentoring gave managers the opportunity to practice their coaching skills allowing them to take ownership for their learning.
- Internal mentoring schemes are good value for money because mentors volunteer their time.
- Mentoring can motivate staff and improve performance by ensuring that employees have the skills, knowledge and experience to do their jobs effectively.
- Mentoring can support individuals during a period of change.

Further Information

This case study was undertaken between August 2012 and September 2012. Further information about the programme can be found at http://www.assetskills.org/Projects/TalentManagement.aspx. If you would like to speak to someone about this approach please contact Helen Kemp (Insight Officer, Asset Skills, email: hkemp@assetskills.org).

6. Conclusions

Historically, organisations have relied on formal training courses to fill gaps in staff skills, experience and knowledge but this "wholesale transfer" is not thought to stretch individual employees to their full potential (Serrat, 2009).

More recently, there has been a trend towards the use of targeted coaching and mentoring schemes as part of organisations wider talent management strategy to develop high performance employees in an economic climate that has forced many organisations to re-structure and lower operational costs.

From an employee perspective, coaching and mentoring can improve motivation, develop skills, provide a broader knowledge on the industry, build on employee strengths and mitigate employee weaknesses. This can improve overall organisational performance by up-skilling and empowering staff so that they are prepared to meet targets. Table 2 shows some of the other benefits identified by employers.

Table 2: Benefits of coaching and mentoring schemes

Coaching	Mentoring
Enrich personal development planning	Improve staff skills, knowledge and experience
Improve staff skills, knowledge and experience	Improve organisational performance
Improve organisational performance	Support people through change
Develop solutions to overcome obstacles	Facilitates career development
Access networking opportunities	Access networking opportunities
Targets specific strengths and weaknesses	Develop solutions to overcome obstacles

Source: Asset Skills, 2012

However, Peel (2004) argues that a lack of understanding about what coaching and mentoring means for an organisation can create problems and effect the deployment of any type of development activity, reducing the return on investment.

Those employers that participated in the case study research suggested that to overcome this, senior managers must be committed to the implementation of coaching and mentoring schemes, organisations must be prepared to re-iterate what the scheme is about and must evaluate the benefits of the coaching and mentoring scheme to make a strong business case for its continuation.

The employers identified several key questions to ask when considering implementing a coaching and mentoring scheme. These included:

1. What do you want to achieve?
2. What structure is best for your organisation?
3. What sector specific skills will be in demand during the next five to ten years?
4. Do you need to target a specific group of staff?
5. How will this link to our organisations wider business strategy?
6. Do you have the support of your senior management team?
7. Do your needs and resources enable you to run an internal scheme or is it more appropriate or useful to access a wider network through an inter organisation or open scheme?

7. Recommendations

This case study research shows the key characteristics of successful coaching and mentoring schemes across the housing sector. This is extremely important because in the current economic climate, roles are changing due to organisational re-structuring and there is more pressure to meet organisational targets by developing high performance employees.

The literature review showed that a well-implemented coaching and mentoring scheme can ensure that employees have the right skills can improve workforce performance, motivation and retention, which can have significant benefits for the employer by cutting recruitments costs and ensuring that organisations have the skills they need for the future.

To ensure that coaching and mentoring schemes are successful, a number of recommendations have been made by the employers that participated in this research:

- Have trained coaches or mentors with the experience to provide practical advice to solve dilemmas.
- Ensure your organisation is committed to the long-term development of a coaching and mentoring scheme.
- Provide networking opportunities for participants in coaching and mentoring schemes so they can share experiences and practice newly acquired skills.
- Provide support and supervision so mentors/coaches can continue to seek advice for their own personal development.
- Develop an effective matching process to ensure the coaching/mentoring relationship is successful.
- Ensure that coaching and mentoring sessions have clear objectives that will produce actionable results.
- Have an evaluation process in place to capture the benefits of the scheme and ensure there is a clear business case to continue.

Appendices

Appendix 1: Case Study Questionnaire

Asset Skills Coaching and Mentoring Research

Asset Skills are looking to publish a series of case studies on coaching and mentoring in companies outside of the built environment and facilities sector.

We would appreciate it if you could please complete the following questions and return them to Helen Kemp (Insight Officer, Asset Skills, email: hkemp@assetskills.org) within one week of receiving this questionnaire. If you have any questions or concerns, please do not hesitate to contact Helen on 01604 233336.

Please could you provide us with the following contact information. We will need to contact you to ensure that you are happy with the final case study we produce:

Name:	
Company:	
Town / City:	
Job Title:	
Telephone:	
Email address:	

Question 1: Please tell us a bit about your company's background.

Answer (Please provide as much detail as possible):

Question 2: Please tell us about your coaching and mentoring programme.

Answer (Please provide as much detail as possible):

Question 3: In your opinion, what are the three key characteristics of a quality coaching and mentoring programme?

Answer (Please provide as much detail as possible):

Question 4: How does your coaching and mentoring programme relate to your wider business objectives?

Answer (Please provide as much detail as possible):

Question 5: Who does your coaching and mentoring programme target?

Answer (Please provide as much detail as possible):

Question 6: Why do you think coaching and mentoring is important to your organisation?

Answer (Please provide as much detail as possible):

Question 7: Why do you think coaching and mentoring is so important to your staff?

Answer (Please provide as much detail as possible):

Question 8: With regards to your coaching and mentoring, do you have any plans to further develop the programme in the future?

Answer (Please provide as much detail as possible):

Question 9: What would be your advice to other employers considering implementing a coaching and mentoring programme?

Answer (Please provide as much detail as possible):

Question 10: Can we contact you again to confirm that you are happy with the case study we produce?

Please delete as appropriate: yes / no

Thank you for taking the time to participate in this case study research

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Notes

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