

ABRIDGED PREVIEW

Mentoring Works Facilitator's Guide

Preview Only

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William Halbert, Ph.D.
Jean K. Reynolds, M.Ed.

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Facilitator Kit

Overview

This facilitator kit includes the following items:

- Copy for flip charts and masters for case studies and handouts
- Facilitator guide with thumbnails of PowerPoint slides with master of participant guide
- Black and white PowerPoint slides
- CD with PowerPoint file of slides

How to Use the Facilitator Guide

The facilitator copy is on the left-hand pages and participant copy w/answers as appropriate is on the right-hand pages. The facilitator guide is formatted in two columns: The right column contains teaching notes, including such information as content points, possible examples, how to set up and process exercises, and suggested answers to exercises. The left column includes media notes, such as the related overhead slides.

Using the PowerPoint Slides

The slides for this course are on the enclosed CD and included a color file as well as a black-and- white hard PowerPoint file.

Design of the Facilitator Guide

The facilitator guide is designed to give facilitators both directions and content. Sidebars provide a visuals to help you know at a glance what media you will be using to convey specific content. The **references to slide numbers, titles of flip charts, and names of activities** are set in a different type from the content. Content is written from a conversational, first-person perspective. [Directions are in brackets.] Page numbers for the participant guide are give in a box above the page numbers for each page in the facilitator guide.

Logistical Information, Materials, and Supplies

Class Size: 15-25

Course Length: Full day; fast track option for half day

Prerequisites/Pre-seminar Assignment: Each participant should be asked to bring a copy of his/her company's vision or mission statement. This is critical to the content of this course. If this is being taught within a company, prepare a flipchart of the company's vision/mission statement.

Learner Profile: Mentors selected from throughout the organization

Number of Facilitators: 1-2

Facility Needs: 1 large training room near restrooms and water fountain (see option under Supplies below)

Equipment Needs:

- Projection for PowerPoint
- 2 flipchart easels with a back to support writing (not display easels)
- Additional flipchart easels for each participant table (optional)

Materials:

- Participant Manuals, 1 copy per participant
- Overhead slides or PowerPoint electronic file
- Copies of organization-specific vision or mission statements
- Complete sets of work sheets/envelopes for each of the five "companies" in the case study activities. See Facilitator Guide page 6 for directions and pages 7-16 for masters.
- Course evaluation forms

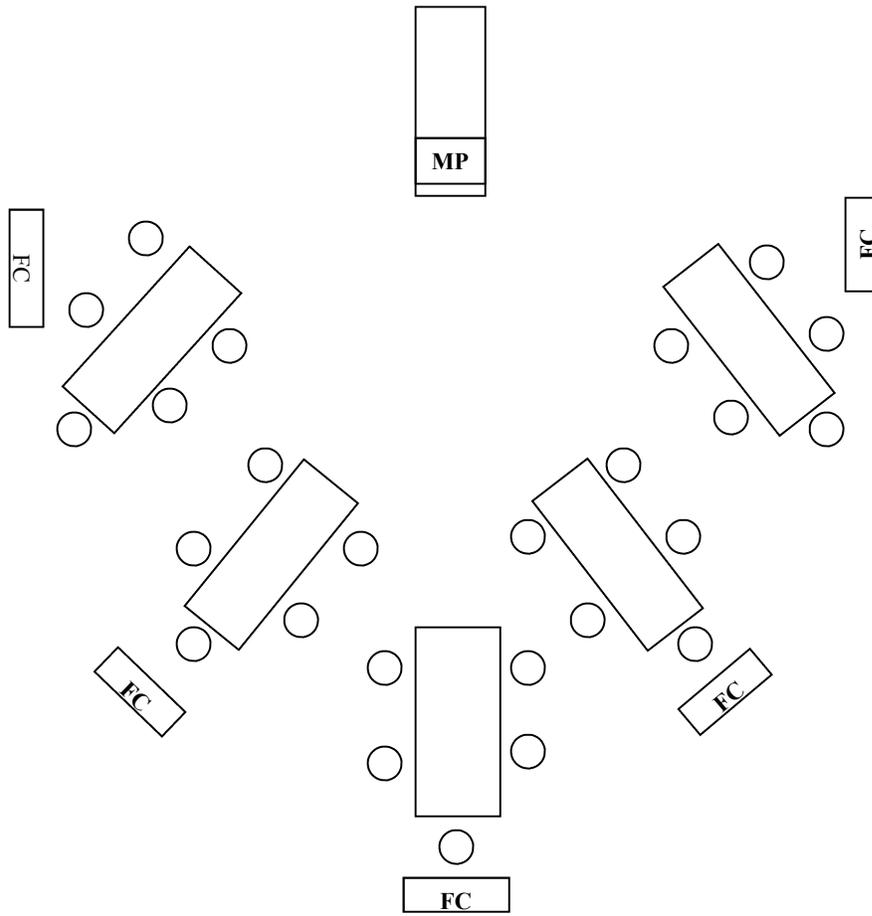
Supplies:

- 2-3 water-soluble transparency pens (if using overheads)
- Medium-sized, colorful gift bags, 1 per table, called *Activity Bag*.
- 20-25 watercolor flipchart markers in assorted dark colors; some will be put in the Activity Bag for each group.
- 1 flipchart pad for each easel
- Masking tape
- Felt-tipped pens placed in the Activity Bags; 1 per participant.
- Card stock/index cards, a different color for each table
- 17-x-24-inch paper
- Table tent cards or name tags for each participant and facilitator
- Optional: Pitchers of water/glasses or bottled water.

Pre-course Set tables with manuals, tent cards or name tags, and pencils or

Logistics: pens for each participant. Place material in Activity Bags as indicated.

Suggested Room Setup



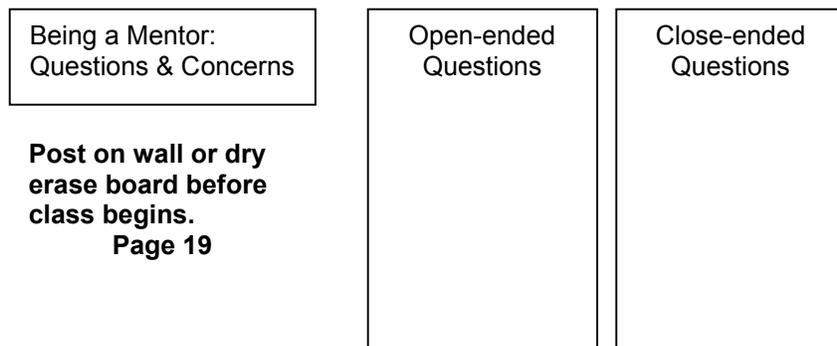
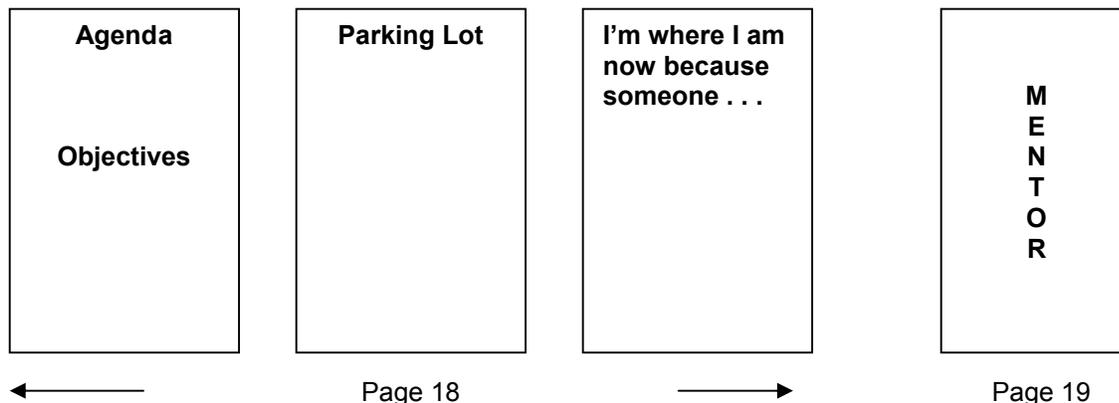
FC: Flip Chart
MP: Media Projection

This set-up is for the maximum
of 25 participants

Flip Charts and Other Materials to Prepare

Supplies for each table: crayons, colorful flip chart markers

Tear Sheets: Prepare tear sheets with text as indicated below.



Make enough of each of these tear sheets for $\frac{1}{2}$ of the tables. Place in 1 in each table's Activity Bag.
Page 34

Get It There Fast, Inc.
How would you state the **purpose** of such a mentoring program?
[allow space for writing]
[Abridged for preview.]

Simply Stuff
How would you state the purpose of such a mentoring program?
[allow space for writing]
[Abridged for preview.]

What-a-View Resort
How would you explain the value of participating in a mentoring program to summer staff?
[Abridged for preview.]



This State's Education Department
What will you say to your mentoree to support the program emphasis that to be chosen to be a mentoree is an honor?
[allow space for writing]
[Abridged for preview.]

Open Wide
What organizational opportunity does your mentoring program address?
[allow space for writing]
[Abridged for preview.]

Suggested Responses for the Case Study This State's Education Department

Share this sheet with your group. Use the tear sheet included in the activities bag to capture your discussion.

[Abridged for preview.]

This program will help our department retain excellent employees and reduce training time when a person is promoted, which of course saves money.

Case Study: Open Wide

Share this sheet with your group. Use the tear sheet included in the activities bag to capture your discussion.

[Abridged for preview.]

Why would you want to build recognition, rewards, and celebration into the program?

What kinds of recognition, rewards, and celebrations would be appropriate?

Succession Planning Mentoring Program Mentor Checklist

Instructions: Complete one checklist for each mentoree.

Mentor: _____ Mentoree: _____

Start Date: _____

As a mentor, I need to ensure that the people I mentor are aware of the following:

General Company Information:

DATE

Job-Specific Information

DATE

Mentoring Tips

[Abridged for preview.]

Cultural Change Mentoring Program Mentor Checklist

Instructions: Complete one checklist for each mentoree.

Mentor: _____ Mentoree: _____

Start Date: _____

As a mentor, I need to ensure that the people I mentor are aware of the following:

General Company Information:

DATE

Job-Specific Information

DATE

Mentoring Tips

[Abridged for preview.]

Mentoring Contract

Purpose:

Priorities:

Knowledge and Understanding:

Skills and Abilities:

Meeting Schedule/Amount of Time:

Length of the Mentoring Relationship:

Full-day Course Schedule

Course Introduction

Introduction and Housekeeping Details	10 minutes
I'm where I am now because someone . . .	15 minutes
Real Life: Being a Mentor	30 minutes
Break	10 minutes

Module 1: A Formal Mentoring Program

Informal and Formal Programs and Definitions	30 minutes
The Value of a Formal Mentoring Program	5 minutes
Organizational Needs	8 minutes
Program Structure	30 minutes
Case Studies	30 minutes
Break	5 minutes
Lunch	1 hour

Module 2: The Mentoring Cycle

How to Change Behavior	2 minutes
Preparation	15 minutes
Meeting	30 minutes
Follow-through	20 minutes
Mentor and Mentoree Responsibilities	15 minutes
Break	20 minutes

Module 3: Feedback

How to Change Behavior	7 minutes
Definitions of Feedback	3 minutes
Opportunities for Feedback	5 minutes
How to Give Feedback for Development	15 minutes
The Tridot Hat Company	45 minutes
Feedback Application	5 minutes

Conclusion

Real Life: Questions and Answers	30 minutes
Action Plan	15 minutes

TOTAL: 6 hours with breaks and lunch.

Preview Note: A half-day schedule is included in the facilitator guide.

Introduction

Welcome and Workshop Overview

Mentoring Works
A Formal Mentoring Program
Training for Mentors

Slide 1: Mentoring Works A Formal Mentoring Program: Training for Mentors

Welcome to this workshop on mentoring. Congratulations on being chosen to be mentors. You've demonstrated mastery of your work and ability to help others learn. Today we will explore what mentoring is, the purpose for our mentoring program, and responsibilities you will have as mentors.

[Facilitator(s) introduces self and shares the importance of mentoring based on personal and professional experiences and shares the goal for the training.]

At your table you have supplies that will be used during our workshop. At various times I'll ask you to take something from the Activity Bag. [Hold up one of the bags that has supplies in it.]

[Cover housekeeping: Breaks, restrooms and phone locations, any ground rules about pagers, cell phones, interruptions, etc.]

Parking Lot

FC: Parking Lot

If at any time during the workshop you have a question on the topic, feel free to ask me or another participant. If I think the question will be better answered later in the workshop or no one has a satisfactory answer, I will ask you to write the question on the "Parking Lot" tear sheet posted in the room. At the end of the workshop, if all questions on the parking lot have not been answered, I will take them as an assignment and get answers and share them with you or I will find the person you should ask within the organization.

Open your workbooks to page 1.

Agenda

Objectives

FC: Agenda and Objectives

[Review the agenda.]

Read through the learning objectives for this workshop and then write at least one personal learning objective.

Who would like to share your learning objective with the group?

For us to meet the workshop objectives and your personal learning objectives, everyone will need to participate.

[Next: Slide 2: I'm where I am today because someone . . .]

Agenda

- Welcome and Introduction
- Unit 1: A Look at a Formal Mentoring Program
- Unit 2: An Explanation of the Mentoring Cycle
- Unit 3: The Importance of Feedback
- Conclusion: How Ready Am I to Be a Mentor?

Learning Objectives

After completing this workshop, participants will be able to:

- ◆ Describe the value of a formal mentoring program to the organization, the mentoree, and the mentor.
- ◆ Guide mentorees through the mentoring cycle, addressing specific learning and organizational goals.
- ◆ Use positive feedback and feedback for development to help mentorees explore what is going well and what needs improvement.
- ◆ Grow in confidence and competence in the role of mentor.

Personal Learning Objectives

What do you need from this workshop in order to say you spent your learning time well?



I'm where I am now because someone . . .

M
E
N
T
O
R

Slide 2: I'm where I am today because someone . . .

FC: I'm where I am today because someone . . .

How would you complete this sentence? [Expected responses include: *took an interest in me and my career; cared; taught me the ropes, etc.*]

Complete the concept map on page 3 by filling in the ovals with the names of people who have helped you grow professionally.

[Allow 3 minutes to develop; 3 minutes to debrief]

How many of you had to draw more ovals or added directional lines to connect you with someone who helped you grow? [show of hands]

FC: Mentor

What are some words that describe how these people helped you grow?

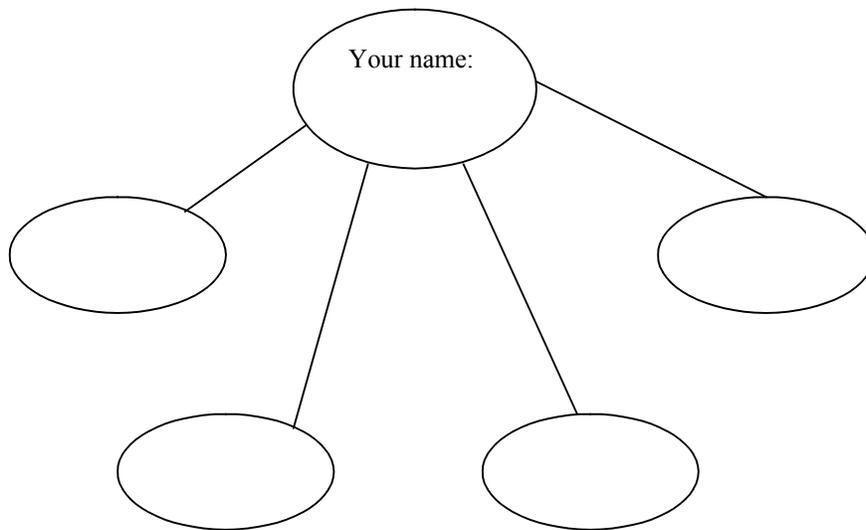
[Use a different colored marker to record responses. You are looking for synonyms for mentor/mentoring. Expected responses include: *coached, mentored, taught, guided, counseled, modeled, led, instructed, befriended, advised, etc.*]

[Next: Slide 3: What questions or concerns do you have about being a mentor?]

I'm where I am now because . . .



INSTRUCTIONS: Complete this concept map by filling in the ovals with the names of people who have helped you grow professionally.



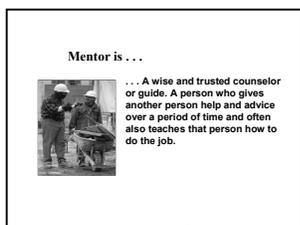
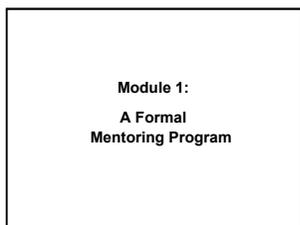
What words describe how these people helped me grow?

Module 1: A Look at a Formal Mentoring Program

[Module Objectives

In this module, participants will examine the value of the formal mentoring program. At the conclusion of this module, participants will be able to:

- Discuss the differences between informal and formal mentoring programs
- Explain the value of a formal mentoring program to mentorees, the organization, and mentors.
- Identify three organizational needs for mentoring programs.
- Understand the structure of the mentoring program.]



Slide 4: A Formal Mentoring Program

Mentoring has been around a long time in business. Sometimes it has been very informal, learning something you're interested in from someone who does it well. This relationship has been formalized in journeyman and apprenticeships for centuries. Guilds developed around crafts and trades in part to ensure both the survival of the craft or trade and the quality of goods produced. Lawyers and doctors once learned medicine by "reading" with an older, more experienced lawyer or doctor. [Insert contemporary illustrations as appropriate for the audience.]

Slide 5: What experiences have you had that you would call informal mentoring?

How many of the relationships you mapped on page 3 are or were informal mentoring relationships? [See facing page. Take 2-3 responses.]

Slide 6: Mentor

Let's look now at the word *Mentor* and its current business definition. [See facing page for definition.]

How does mentoring differ from some of the other words we put on the chart? [See possible responses on facing page.]

[Next: Slide 7: For whom have you been a mentor?]

What experiences have I had that I would call informal mentoring?

Check the statements below that describe your mentoring experiences.

- Goals were unspecified.
 Goals were unspecified.
 Outcomes were known.

[Abridged for preview.]

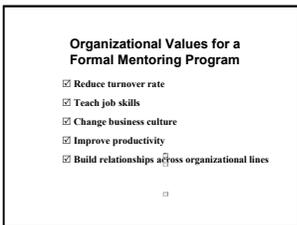
[Marked statements generally indicate an informal mentoring experience.]

A Current Business Definition of *Mentor*:

A wise and trusted counselor or guide. A person who gives another person help and advice over a period of time and often also teaches them how to do their job.

How does the word *mentor* differ from some of the other words we put on the chart?

Mentoring is more than coaching. It can be informal. It can be formal. Its business purpose may be to prepare someone for a more challenging position, such as a management position. It has a business connection in a way that friendship and counseling don't have. It is between two adults and therefore, operates on a different level than parent/child relationships. Guide, leader, and role model are closest to mentor because all three are part of mentoring.

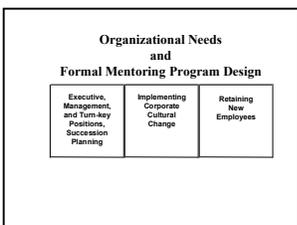


Slide 10: Organizational Values for a Formal Mentoring Program

Formal mentoring looks and acts differently than informal mentoring. Specific goals are set, outcomes can be measured, and it is open to all who qualify.

Which values of a formal mentoring program seem to be the most important to the organization right now? Check the statements that identify what seems most important to your organization right now.

We'll talk about how both mentorees and mentors were selected for your organization's program later. The organization benefits directly from the mentoring process, as do the mentoree and mentor.



Slide 11: Organizational Needs and Formal Mentoring Program Design

Formal mentoring programs can be targeted to help an organization achieve results in specific areas. For example:

In a company with a succession plan, a formal mentoring program can add depth and breadth to the knowledge and experience of the person chosen to succeed someone in a management position or in a turn-key position (we'll be defining turn-key positions in a few minutes).

[PPT: Bring in first kind of mentoring program: Succession Planning]

If top management wants to make a change in corporate culture, having top management as mentors can put them in position to influence, guide, understand, and support middle managers as they learn the new expectations. This is usually a multi-tiered program with mentoring being a top-down model, from executives mentoring directors who mentor managers.

[PPT: Bring in second kind of mentoring program: Implementing Corporate Cultural Change]

If a company's turnover rate is very high in the first year of employment, a mentoring program that pairs experienced employees with new employees can provide much more than organizational new employee orientation and short-term on-the-job orientation can.

[PPT: Bring in the third kind of mentoring program: Retaining New Employees]

[Next: Slide 12: What is the purpose or focus of our mentoring program? Does it fit our company's vision?]

Facilitator Tip
 Customize the slides and related content to be specific to your organization right now. Indicate to participants which pages you will be using in their manual to focus only on the organizational need your mentoring program addresses.

Organizational Values for a Formal Mentoring Program

Which values of a formal mentoring program seem to be most important to my organization right now?

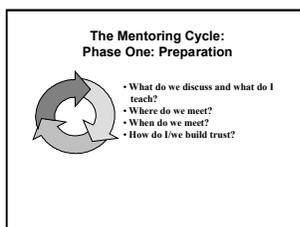
- Reduce turnover rate
- Teach job skills
- Change a business culture
- Improve productivity
- Build relationships across organizational lines

Which of the organizational needs was our mentoring program designed to address?

EXECUTIVE, MANAGEMENT, AND TURN-KEY POSITION SUCCESSION PLANNING

IMPLEMENTING CORPORATE CULTURAL CHANGE

RETAINING NEW EMPLOYEES



Slide 22: The Mentoring Cycle: Phase One: Preparation

Preparation for mentors included handling the logistics of where and when to meet. The driver for the meetings is the purpose and priorities of the mentoring relationship. [Customize this discussion based on the purpose of your organization's mentoring program.]

What to discuss or teach: Purpose of mentoring relationship. Priorities.
Where to meet: Where the work is done. Neutral location,
When to meet: Purpose and priorities. Skills and work schedules

On page 15 in your manual, fill in the blanks related to the purpose of your mentoring relationship, where you will probably meet most often, and when you think you'll meet (this could be day of the week; time of day).

How to build trust: Unless you and your mentoree are already colleagues and/or friends, you'll need to intentionally work to build trust. No mentoring relationship can be successful without trust.

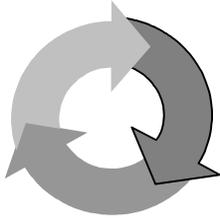
Working with a partner, discuss and record responses to the questions/ statements on page 15 of your manual.
<7 minutes>

What do you think are the 3 most important beliefs or actions related to trust? [See facing page for possible responses.]

What pitfalls are you aware of that destroy trust? [See facing page for possible responses.]

What will you do to avoid these pitfalls? [See facing page for possible responses.]

[Next: Slide 23: The Meeting.]



The Mentoring Cycle: Phase One: Preparation

I'll be prepared when I know . . .

What I need to do first: _____

Where we shall meet: _____

What skills and work schedules will influence when we meet: _____

How I/we will build trust.

What do you think are the 3 most important beliefs or actions related to trust?

[Abridged for preview.]

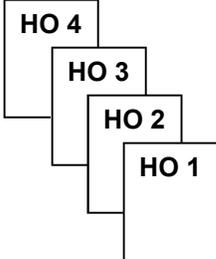
Which of these 3 things come most naturally to you?

[Abridged for preview.]

**Partner
Interviews**

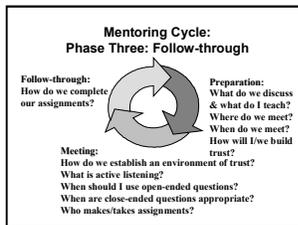
What are my specific responsibilities as a mentor?

Executive, Management, Turn-key Position, Succession Planning	Implementing Corporate Cultural Change	Retaining New Employees
Succession Planning	Corporate Culture	Extended Orientation
Helps mentee assess expectations & where to get advice. Holds up a mirror for mentee; provides objective feedback. Listens to mentee's concerns & questions. Explains "unspoken" rules.	Helps mentee understand the rationale for change. Prepares mentee to lead cultural change within his/her own work group. Listens to mentee's concerns & questions. Helps challenge assumptions & "unspoken" information related to change.	Helps mentee know expectations & where to get resources. Shows mentee correct & safe work procedures. Listens to mentee's concerns & questions. Explains "unspoken" rules.



What are mentorees' specific responsibilities?

Executive, Management, Turn-key Position, Succession Planning	Implementing Corporate Cultural Change	Retaining New Employees
Succession Planning	Corporate Culture	Extended Orientation
Prepare for each meeting with mentor. Be curious. Ask questions. Talk openly about feelings. Follow through on assignments.		



Slide 27: What are my specific responsibilities as a mentor? HOs 1-4

Here you see the three kinds of formal mentoring programs and mentors' responsibilities related to each.

How do these responsibilities fit into the mentoring cycle? [Expected responses: *Influence all three parts of the cycle: preparation, meeting, and follow through. Are like the overarching expectations in that they give the big-picture goals.*]

Here is a set of checklists. For this next individual activity, you'll want to use the one that fits your mentoring assignment. You have the others for comparison and ideas.

Read through all of the checklists then focus on the one designed for the mentoring you will be doing.

Slide 28: What are mentorees' specific responsibilities?

Lest you think you're the only ones with responsibilities, let's look at mentorees' responsibilities. These apply in all programs. Mentorees need to be able to listen with open minds to feedback they receive from mentors. Since a part of the mentor's job is to hold up a mirror for the mentoree, the mentoree needs to be able to look into that mirror and discuss situations with mentors until they develop a shared perspective. This involves being open and honest not only with yourself but also with another person.

On page 20 in your manual, sketch out an agenda for your first mentoring meeting, noting the items from the checklist that you think you should cover first. <5 minutes>[Circulate through the room.]

How beneficial will the lists of responsibilities and checklists be for you?

Slide 29: The Mentoring Cycle

Think back to module 1, the formal mentoring program. We discussed metrics and evaluation in that module. Where do metrics and evaluation fit in the phases of the mentoring process? [Expected responses include: *One place is the preparation phase because you need to plan evaluation/metrics into the mentoring process from the beginning. In the first meeting when you establish the goal(s) for the relationship. When making assignments you have to define what complete or successful means and then evaluate the completed work based on that definition.*]

We've discussed some general and specific responsibilities you now have as mentors. As we've done this, we've answered some of the questions you raised early this morning [direct participants' attention to the affinity diagram.]. However, we haven't answered all of them yet, especially those related talking with your mentorees about making changes in attitudes, behaviors, and speech. The last module in today's study will help you with your responsibility to give feedback.

[Next: Module 3: The Importance of Feedback; Slide 30: The Importance of Feedback; Slide 31: How will I affect my mentoree's behavior?]

What are my specific responsibilities as a mentor?

Executive, Management, Turn-key Position, Succession Planning	Implementing Corporate Cultural Change	Retaining New Employees
Succession Planning	Corporate Culture	Extended Orientation
Helps mentoree know expectations & where to get answers.	Helps mentoree understand the rationale for change.	Helps mentoree know expectations & where to get answers.
Holds up a mirror for mentoree; provides objective feedback.	Prepares mentoree to lead cultural change within his/her own work group.	Shows mentoree correct & safe work procedures.
Listens to mentoree's concerns & questions.	Listens to mentoree's concerns & questions.	Listens to mentoree's concerns & questions.
Explains "unspoken" rules.	Helps challenge assumptions & "grapevine" information related to change.	Explains "unspoken" rules.

What are mentorees' specific responsibilities?

Mentorees' responsibilities are the same in all three situations:

- ◆ Be prepared for each meeting.
- ◆ Be curious. Ask questions.
- ◆ Talk openly about feelings.
- ◆ Follow through on assignments.

Based on these responsibilities, the phases of the mentoring cycle, and the specific handout for the mentoring you will be doing, use the right margin to sketch out an agenda for your first mentoring meeting.

Are there any words I should or shouldn't use when giving feedback for development?

<u>Don't Use</u>	<u>Instead Use</u>
Criticism	Another way
Chewing out	Coaching
Generalities	Specifics
Blame	Solution

Slide 38: Are there any words I should or shouldn't use when giving feedback for development?

[After you bring in each pair of words, give examples that are listed on the facing page to illustrate what not to say and what to say.]

What questions do you have about what to say or not to say, what words to use when giving developmental feedback? [Answer questions in ways that are consistent with the process you've just introduced and with the general philosophy of this module.]

Complete the sentence in your manual: "To become competent at giving feedback for development, I will need:"

Because feedback is such an important part of mentoring and most mentoring involves teaching specific tasks at some point, you're going to have the opportunity to practice teaching a task and giving positive feedback and feedback for development in our next activity.

Slide 39: Feedback Application Paper from Activities Bag

Here are the beginning instructions.

Half of the class gets a 10-minute break. The other half will get a 10-minute break a little later.

[Be sure to tell those taking a break to stay nearby. Wait until they are out of the room and the door is shut before moving to the rest of the instructions.]

[Next: Slide 40: Tridot Hat Company.]

Feedback Practice

- Half of the class takes a 10-minute break outside of the room but nearby.
- Half of the class stays in the room.
- Take the paper for Feedback Practice out of the Activities Bag.

Are there any words I should or shouldn't use when giving feedback for development?

Don't use:

Criticism

[As in: I have some constructive criticism I think will help you.

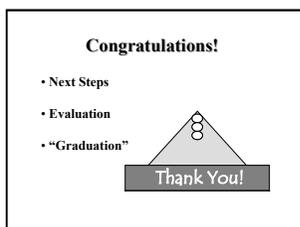
Instead: I'd like to suggest another way to do that.]

Instead, use:

Another way

[Abridged for preview.]

To become competent at giving feedback for development, I will need to:



Slides 47: Conclusion

Optional Test, Participant Manual, pages 39-40

Participant Manual, pages 41-42, Answers

Evaluation Form

Optional Test [Use this at the end of the session or as a post-seminar assignment.]

Evaluation: I want to give you one more opportunity to give feedback. There is an evaluation form at your place. Please complete it. Let me know what went well (positive feedback) and what can be improved (feedback for development). Your feedback is important to me as I improve my skills and our seminar content. You may leave your completed evaluation form at your place or put it in the chair I've placed by the door.

"Graduation": Maybe we should call this "commencement" because you're now ready to begin the mentoring relationship.

[If delivered by in-house facilitators: Make appropriate commitments to participants to be available to coach them as they begin the mentoring relationship.]

Thank you for participating in today's workshop.

Test Yourself [with Answers]

- F 1. Mentoring is exactly like coaching.
- T 2. A formal mentoring program can help an organization with succession planning, corporate cultural change, and/or new employee retention.
- T 3. Measuring and/or evaluating progress is an important part of a formal mentoring program.
- T 4. The three phases of the mentoring cycle are preparation, meeting, and follow-through.
- F 5. Feedback is one person's opinion that another person must accept.
- d 6. Which of the following is **not** true of a formal mentoring program:
- Reduce turnover rate
 - Teach job skills
 - Improve productivity
 - Lasts a long time
- c 7. I may be able to affect my mentoree's behavior through:
- Modeling, behavior modification, and feedback
 - Preparation, meeting, and follow-through
 - Modeling, behavior modification, and confrontation
 - Behavior modification, constructive feedback, and asking questions
- d 8. Which of the following is not a question related to preparation in the mentoring cycle?
- What do we discuss and what do I teach?
 - Where do we meet?
 - How do I/we build trust?
 - How do we communicate between meetings?
- d 9. Which of the following is not a way to establish trust?
- Keep commitments
 - Don't gossip.
 - Share from my experience.
 - Cancel meetings.
- d 10. Active listening means:
- Paying attention to what the other person is saying.
 - Observe body language.
 - Note tone of voice.
 - All of the above.
11. Use open-ended questions to expand the discussion, to learn more about thoughts, feelings, rationale, and opinions.
12. Use close-ended questions to get specific information, yes/no, conclude a conversation.
13. Assignments will be completed by both mentoree and mentor.
14. Mentoree assignments may include research, demonstrations, and practice. [Other possible answers include: attend and observe.
15. Mentor assignments may include research and finding/acquiring resources for mentoring.
16. Positive feedback and feedback for development contain specific information that is shared to help a person achieve the best results.